State of Rhode Island Department of Transportation

Quest Professional User Manual - Draft

Version 03.03.26

Table of Contents

A. Overview

1. General Statements

This User Manual provides rules for the usage of Quest Professional and its functionality and step-by-step instructions for the Quest Professional Software application. It does not cover bidding requirements and conditions for Rhode Island Department of Transportation

This User Manual assumes the user has a basic understanding of Microsoft Window operations and general terminology.

2. Quest Professional Purpose

Quest Professional is a software package used by the consultant for the preparation of a contract for advertising to the contractors. The purpose of Quest Professional is to provide ease of use for data entry, organization of the contract data, quick generation of reports, and easy transfer of contract data between consultants.

3. Technical Support

Any questions regarding technical support for Quest Professional Software can be referred to:

Office of the Chief Engineer Project Tracking Unit
@ (401)-222-2492 or by e-mail at PTS@dot.state.ri.us.
Office Hours: 8:30 AM – 4:00 PM

4. Conventions

My Projects View
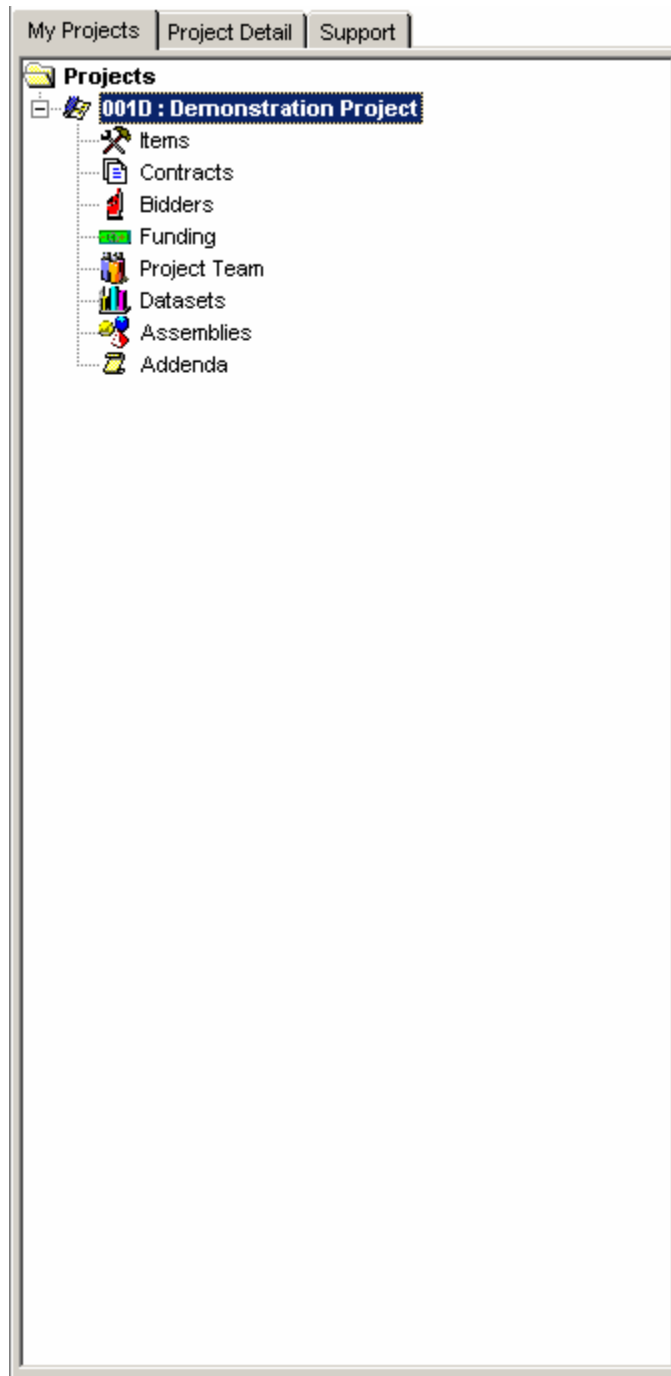
In this tab all of the projects that have been created or imported are listed.

The Demonstration Project has been added to the program for the purpose of this user manual.

Here, standard project information can be viewed and edited.

Project Details
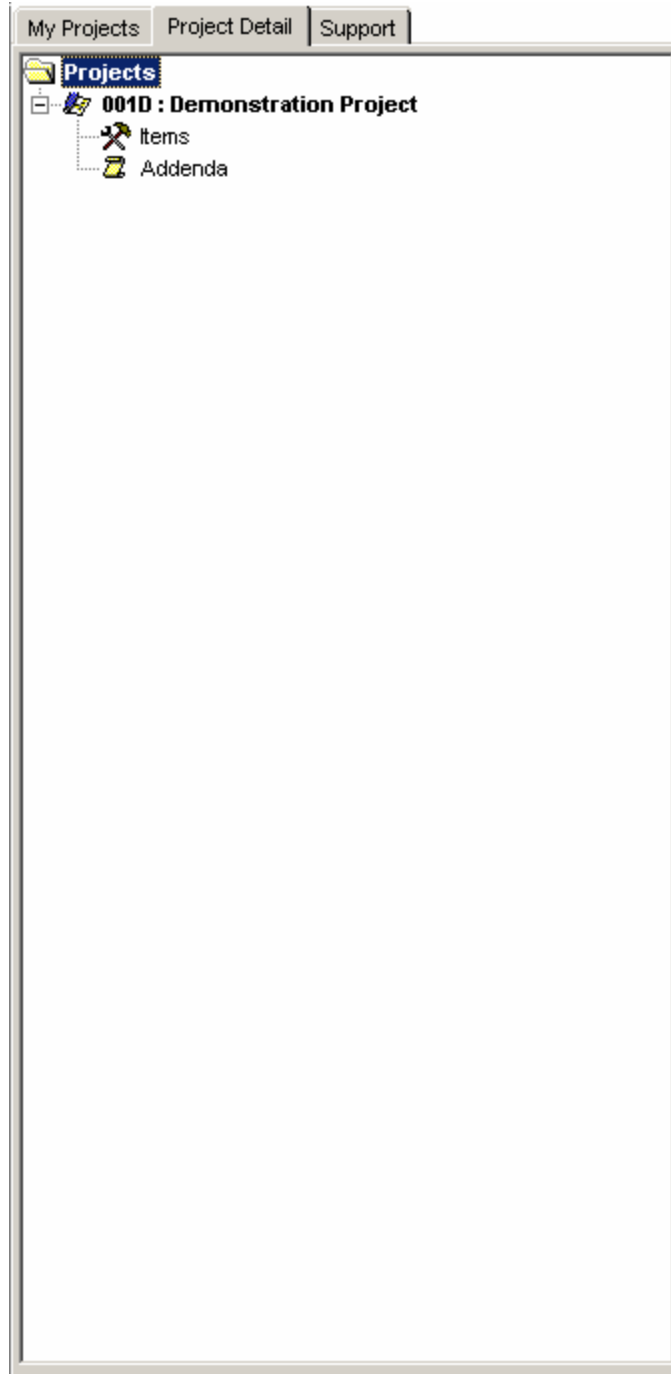
In this tab all projects arelisted.

Here, the user gains access to the project's locations and stations.

Support Tab
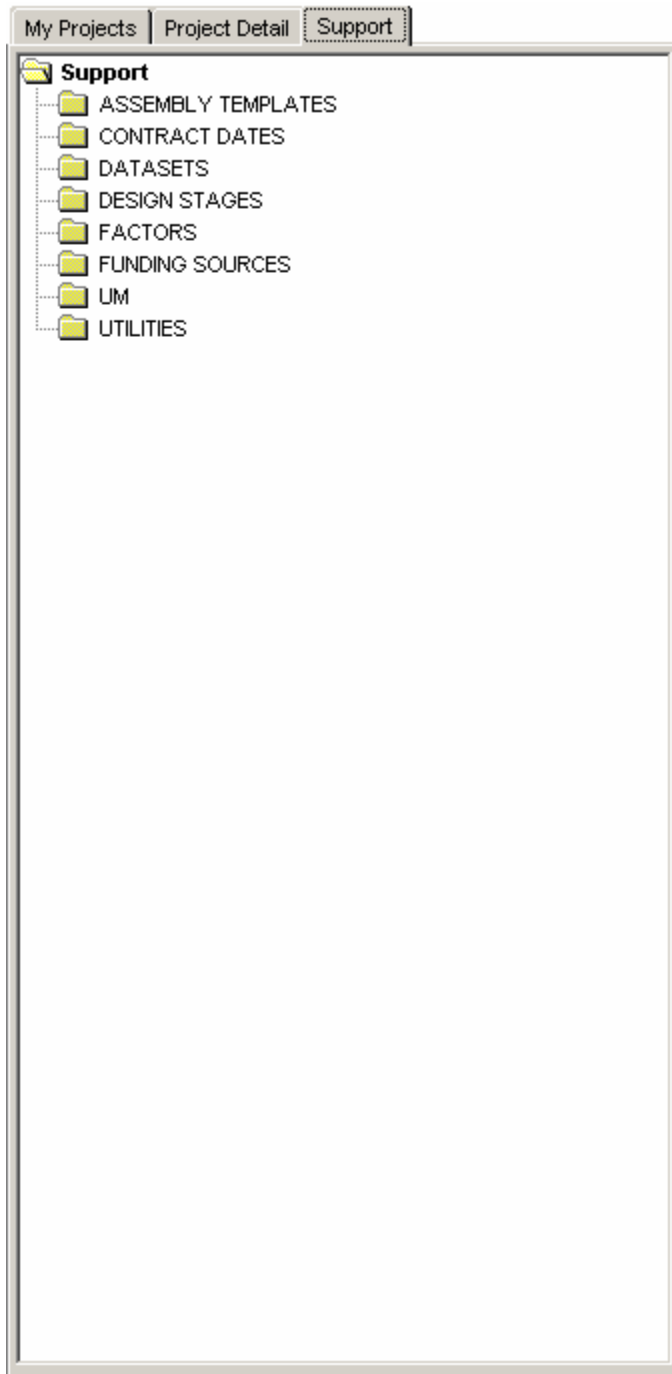
In this tab all of the support information can be viewed, added, edited and printed.

5. Hardware Requirements

These minimum hardware requirements are set by RIDOT to execute Quest Professional on user's machine:

1. Pentium PC 400 running Windows 98 SE/NT 4.0 SP6/WIN 2000 SP2/Windows XP
2. Access to a CD-ROM Drive
3. Access to a Floppy Drive
4. 128 MB of memory
5. 50 MB of Free Hard Disk space for the installation
6. Printer connected to computer
7. Mouse
8. Keyboard
9. 15" or larger color VGA monitor

Quest Professional is not designed to work with Apple computers.

Technical support will not be provided if the user's machine does not meet the above minimum hardware requirements.

5. Install Quest Professional

1. It is important that the person logged into the machine for the installation has Administrative rights to the machine.
2. It is important that all users for the machine have been added to the list of users for the machine.
3. Before installing Quest Professional, if you currently have an older version of Quest Professional on your machine, you must first follow the un-installation instructions for Quest Professional
4. **Windows NT** users must make sure the following items are installed on their computer:
   a. At least Internet Explorer 5.0 with at least Service Pack 2
   b. Service Pack 6 for NT
5. **Windows 98** users must make sure the following item is installed on their computer:
   a. At least Internet Explorer 5.0 with at least Service Pack 2
6. A machine may require a Windows Installer package to be installed first before installing Quest Professional. There is a folder provided for each operating system on the CD:
   a. Windows 98: Installer98 Folder
   b. Windows NT: InstallerNT Folder
   c. Windows 2000: Installer2k Folder
7. Using the mouse double click on the Quest Pro.exe icon located on the Installation CD. The **Enter Password** window will appear.

QuestPro

5. Enter **RIDOT** as the password.

6. Click the [OK] button. The **Quest Professional Setup** Welcome Screen appears.
7. Click the [Next >] button

8. The Destination Folder window will appear. A default location for the destination folder will be suggested for installing Quest Professional into. Use the Browse Button if a different location is desired for Quest Professional to be installed.
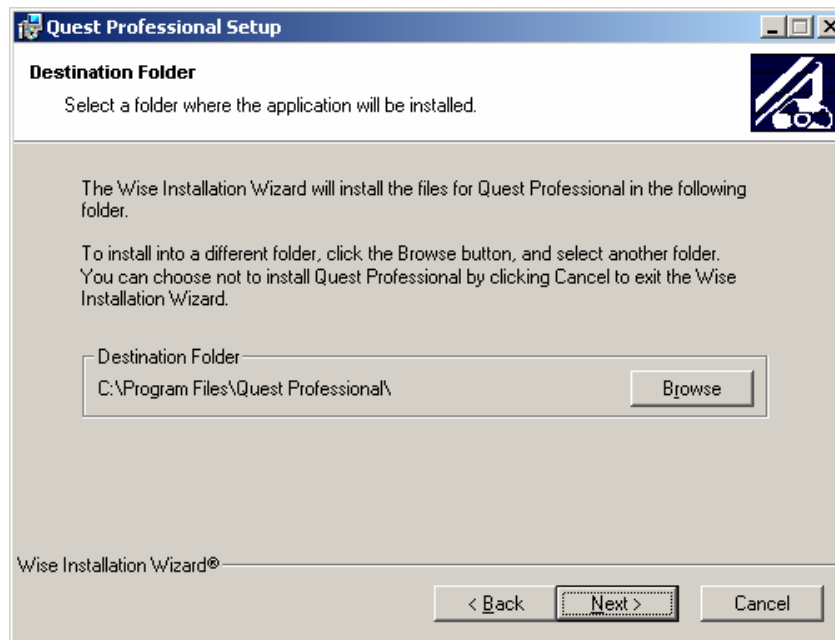
9. Click the [Next >] button. A screen will appear to ensure user is ready to install Quest Professional.
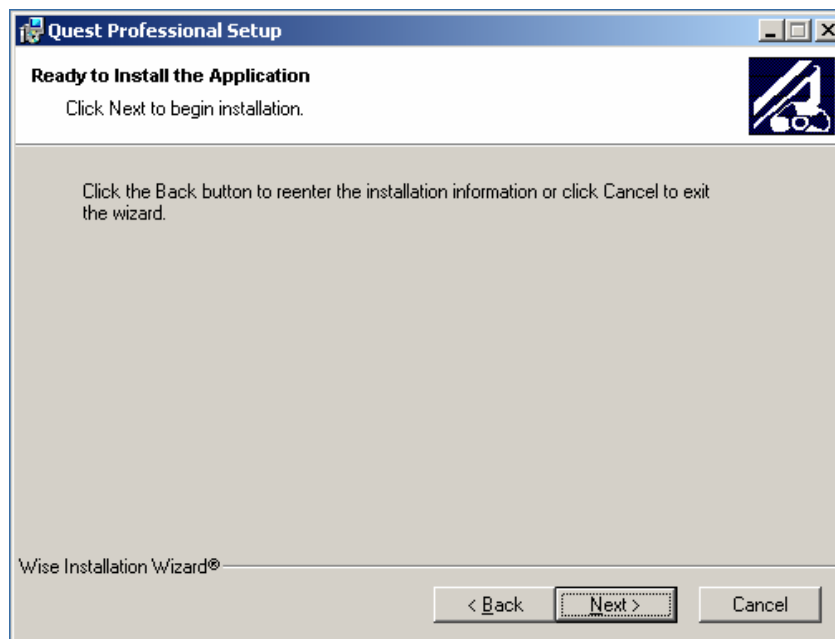
10. Click the [Next >] button. The Quest Professional installation will initiate.

11. When the installation has completed, a screen will appear stating Quest Professional has been successfully installed. Click the [Finish] button.

12. There may be a prompt to restart the computer. Click the Restart button to allow the computer restart.
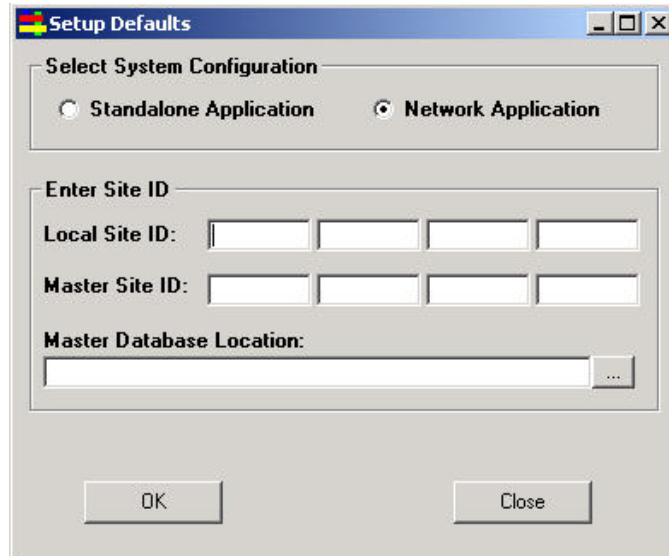
13. **If Network Application: If this is the first network application for the office**:
    After installation, but before logging in the first time, copy PX07MA.kml and
    PX07MS.kml from the C:\Program Files\Quest Professional folder and paste them
    into a designated folder on the server. It is important to note that the file path to
    the server location can only contain alphanumeric characters and spaces.

14. To view Quest Professional, select the Start Button, Select Programs, and Select
    Quest Professional. A login box will appear requesting the Site Codes. This
    information is distributed by RIDOT and will be on a sheet included with the
    installation package.
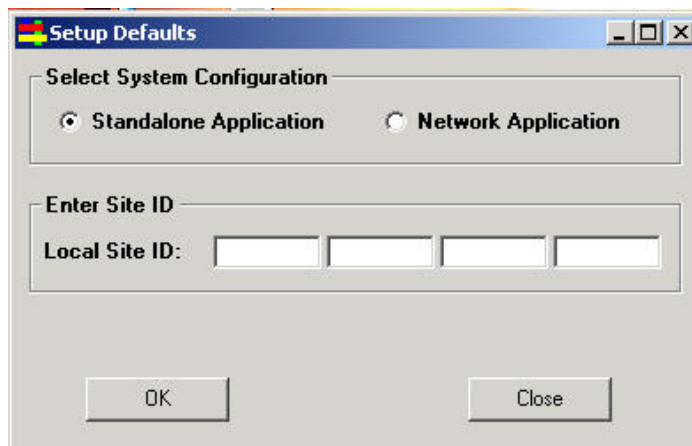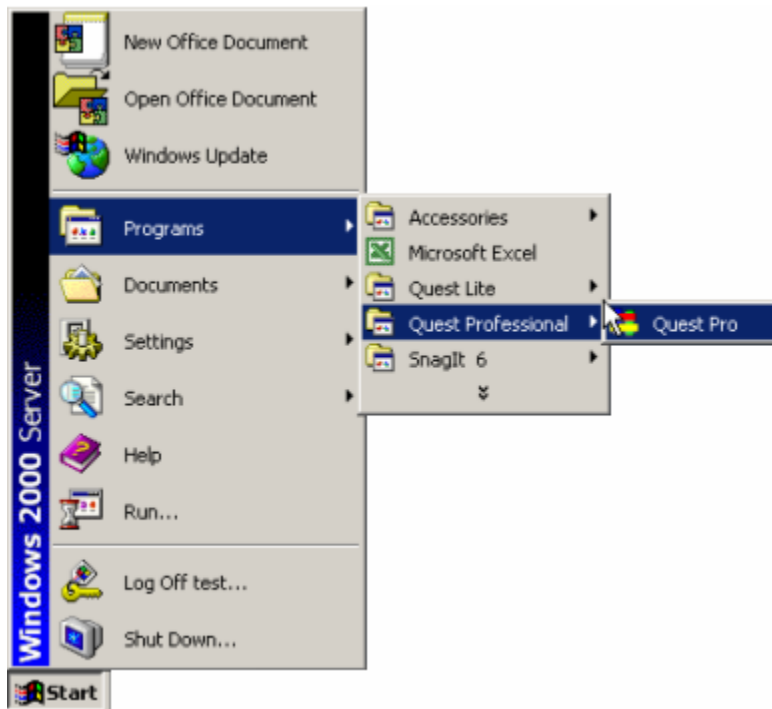
15. Select the correct option for the Type of Application:
   a. **If Network Application:**
      i. Click the option for Network Application. The Setup Defaults Box will request a Master Site ID, Local Site ID, and Master Database Location.
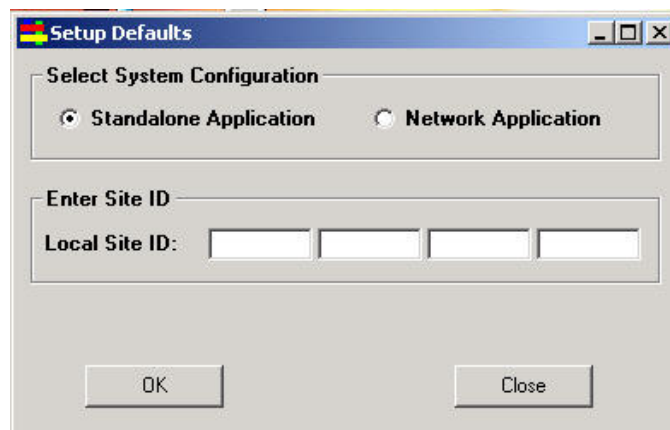
      ii. Type the Local Site ID from the Login Sheet.
      iii. Type the Master Site ID from the Login Sheet. This Site ID should be the same for all machines pointing to the same Master Database on the server location.
      iv. Map the Master Database Location to PX07MA.kml located in the folder on the server as designated earlier.
      v. Once the Default Setup information has been entered, click the OK button.
   b. **If Standalone application:**
      i. Select the Standalone Application option.

ii. Enter the Site ID from the Login Sheet in the Local Site ID text box provided.

iii. Click the [OK] button.

16. If the below message appears after entering the correct Site ID to login into Quest Professional:
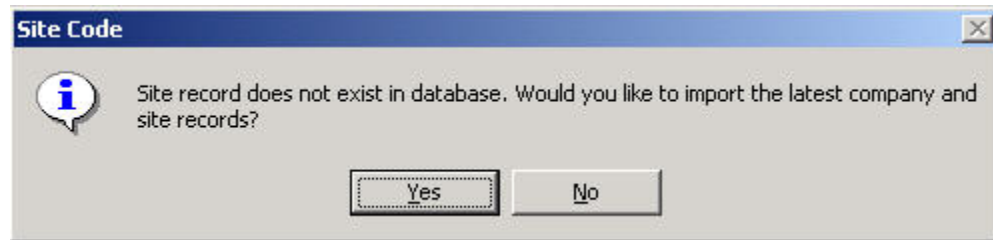
a. Click the [Yes] button.

b. The Import box will appear. Click the [Import] button.
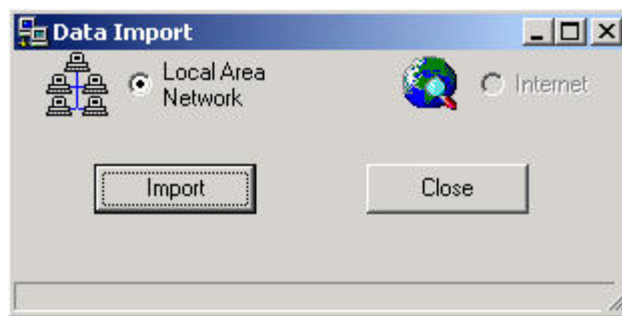
c. Select the correct file which should look similar to 🖥️SITES_189.zip .

d. Click the [Open] button. A message will appear stating the import process may take several minutes.
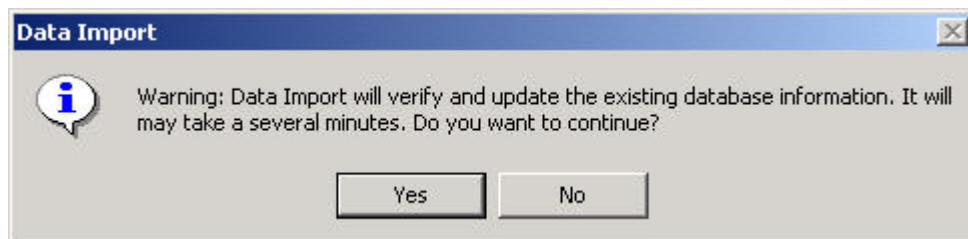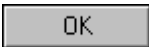
e. Click the [Yes] button.

       f.   A message will appear when the file has been imported successfully. Click the [OK] button.
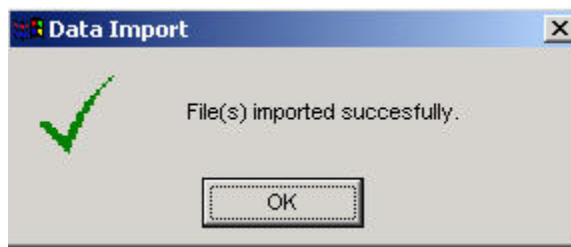
       g.   Click the [OK] button again on the Setup Defaults screen.

17. Enter **admin** for the user name and **admin** for the password.
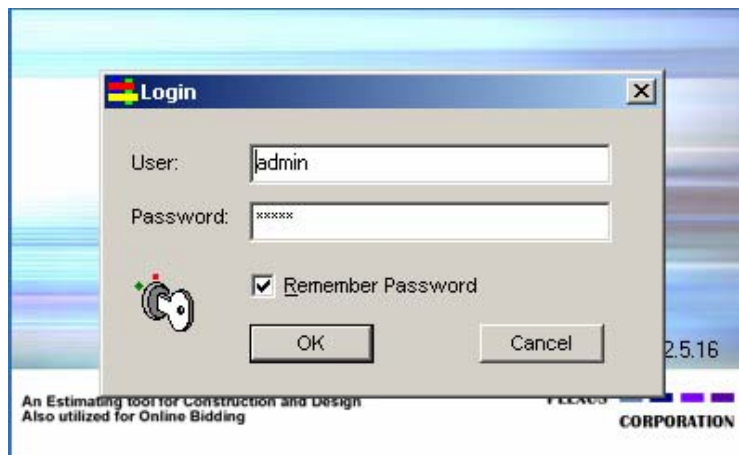
18. Leave a checkmark in the box next to Remember Password if the user name and password should be remembered each time logging in.

18. Click the [OK] button.The Quest Professional Main Screen will now appear.

6. Uninstall Quest Professional

6.1 Windows 98 Operating System
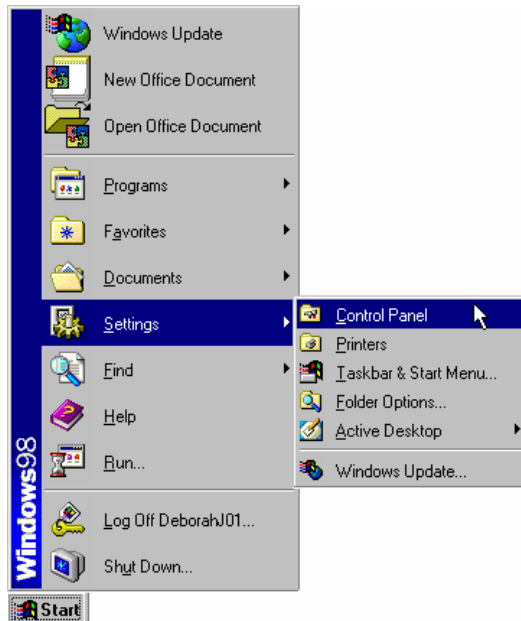
1. Press the Start Button, Settings, and then Control Panel.

2. Double-Click the Add/Remove Programs icon with the mouse. The **Add/Remove Programs Properties** window appears.
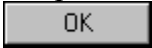
3. Select Quest Professional in the list of programs.
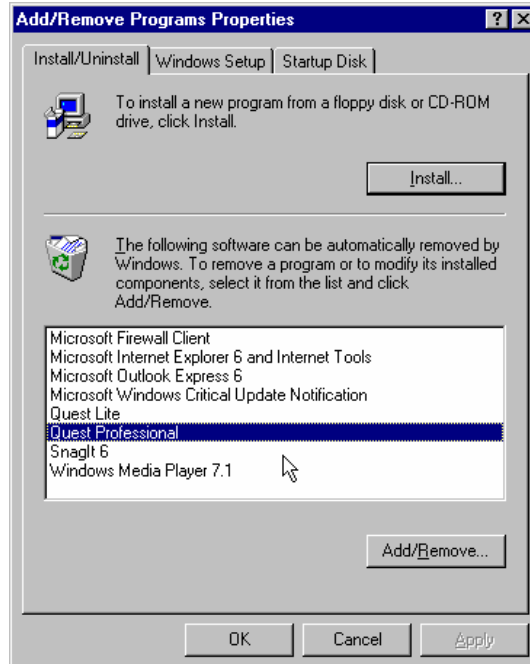
4. Click the [Add/Remove...] button with the mouse.The Windows Installer window appears.
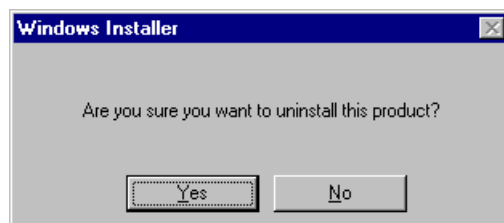
5. Click [Yes], the uninstall process will initiate.

6. Once the process has completed, in the Add/Remove Program Properties window click [OK] .
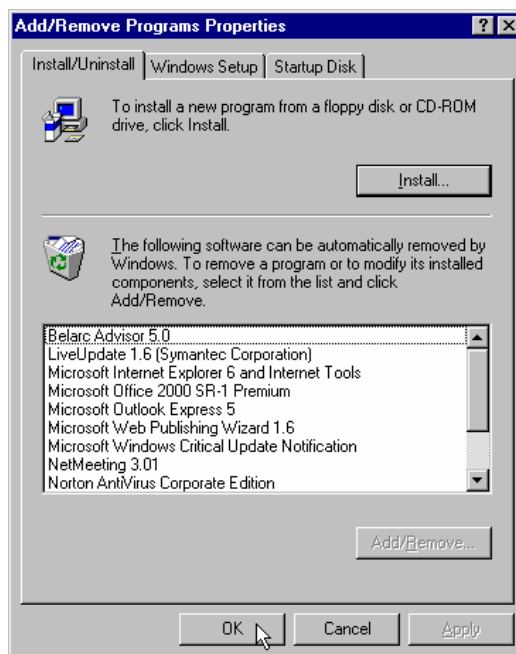
7. Quest Professional has now been removed from the computer.

6.2 Windows 2000 Professional Operating System
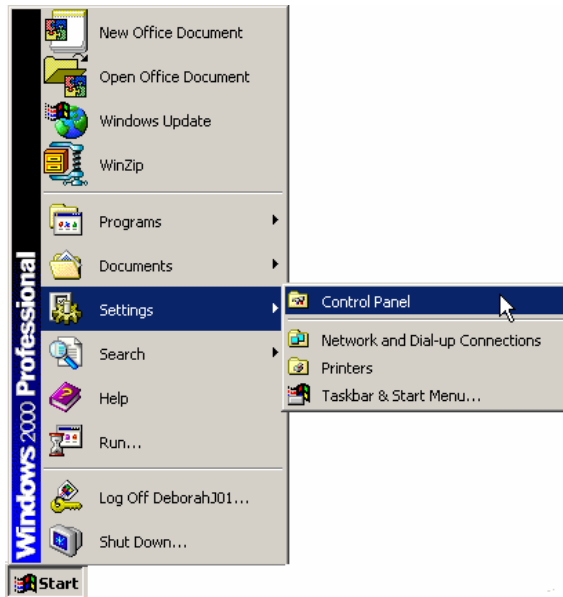
1. Press the Start Button, Settings, and then Control Panel.

2. Double-Click the Add/Remove Programs icon with the mouse. The **Add/Remove Programs Properties** window appears.
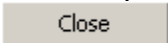
3. Select Quest Professional from the List of programs.

4. Select the [Remove] button. The Windows Installer window appears.
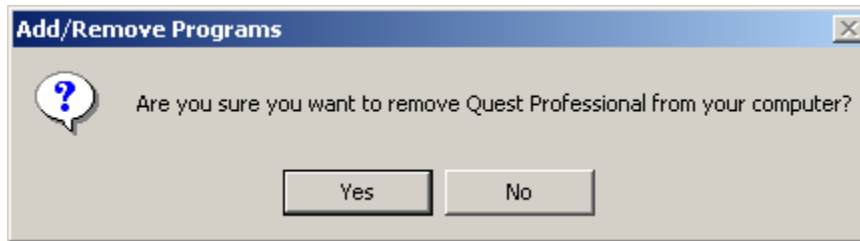
Add/Remove Programs

?   Are you sure you want to remove Quest Professional from your computer?

[Yes]   [No]

5. Click the [Yes] button. The uninstall process will initiate.

6. Once the process has completed, in the Add/Remove Programs window select the [Close] button.

7. Quest Professional has now been removed from the computer.

6.3 Windows NT Operating System
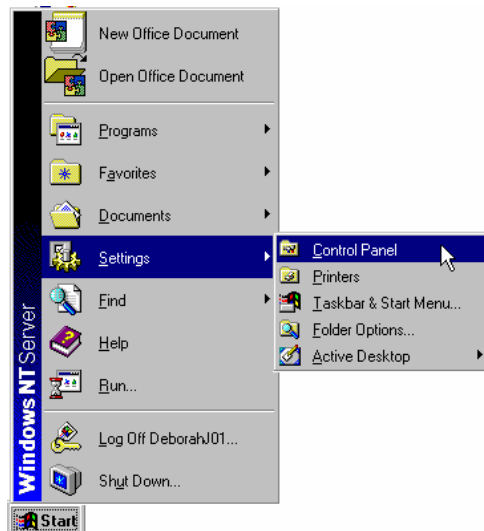
1. Press the Start Button, Settings, and then Control Panel.

2. Double-Click the Add/Remove Programs icon with the mouse. The **Add/Remove Programs Properties** window appears.

3. Select Quest Professional from the List of programs.

4. Click the [Add/Remove...] button. The Windows Installer window appears.
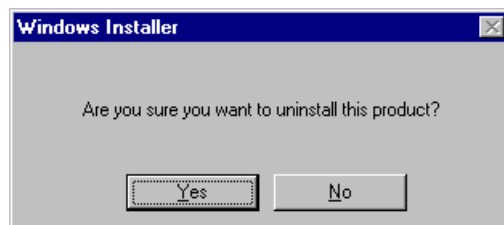
Windows Installer

Are you sure you want to uninstall this product?

[Yes]   [No]

5. Click the [Yes] button. The uninstall process will initiate.

6. Once the process has completed, in the **Add/Remove Program Properties** window click the [OK] button.

Add/Remove Programs Properties

Install/Uninstall | Windows Setup | Startup Disk

To install a new program from a floppy disk or CD-ROM drive, click Install.

[Install...]

The following software can be automatically removed by Windows. To remove a program or to modify its installed components, select it from the list and click Add/Remove.

Belarc Advisor 5.0
LiveUpdate 1.6 (Symantec Corporation)
Microsoft Internet Explorer 6 and Internet Tools
Microsoft Office 2000 SR-1 Premium
Microsoft Outlook Express 5
Microsoft Web Publishing Wizard 1.6
Microsoft Windows Critical Update Notification
NetMeeting 3.01
Norton AntiVirus Corporate Edition

[Add/Remove...]

[OK]   [Cancel]   [Apply]

6.4 Windows XP Operating System

1. Press the Start Button and then Control Panel.

     a.

2. Double-left-click with the mouse on the Add/Remove Programs icon.

3. Click on Quest Professional in the list of programs.

     b.
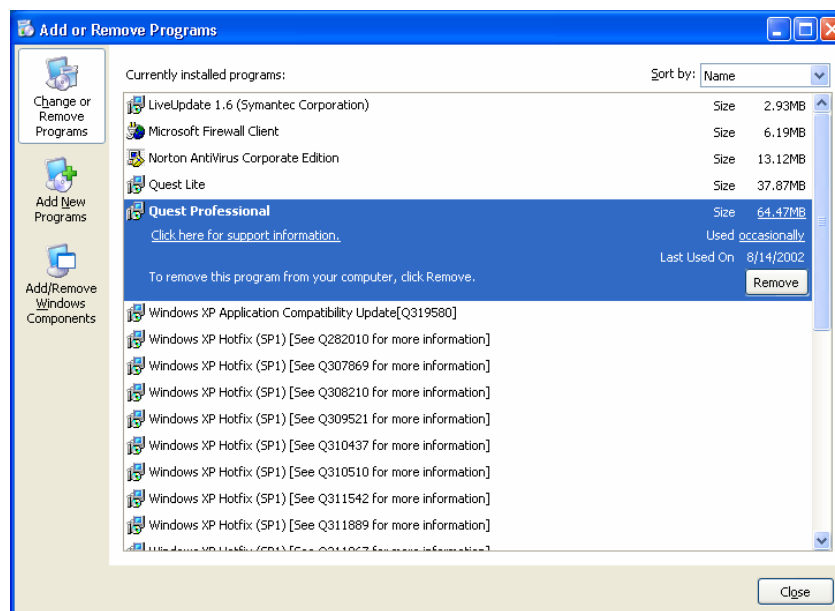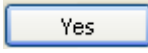
4. Click on the [Remove] button. The **Windows Installer** window appears.
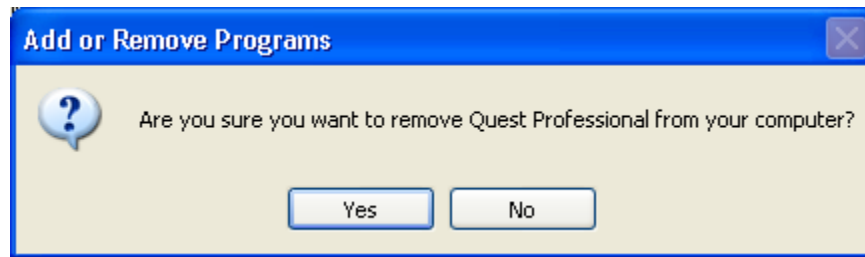
c.

5. Click on the [Yes] button. The uninstall process will initiate.

6. Once the process has completed, in the **Add/Remove Program Properties** window, Quest Professional will no longer display in the **Add/Remove Program** screen.
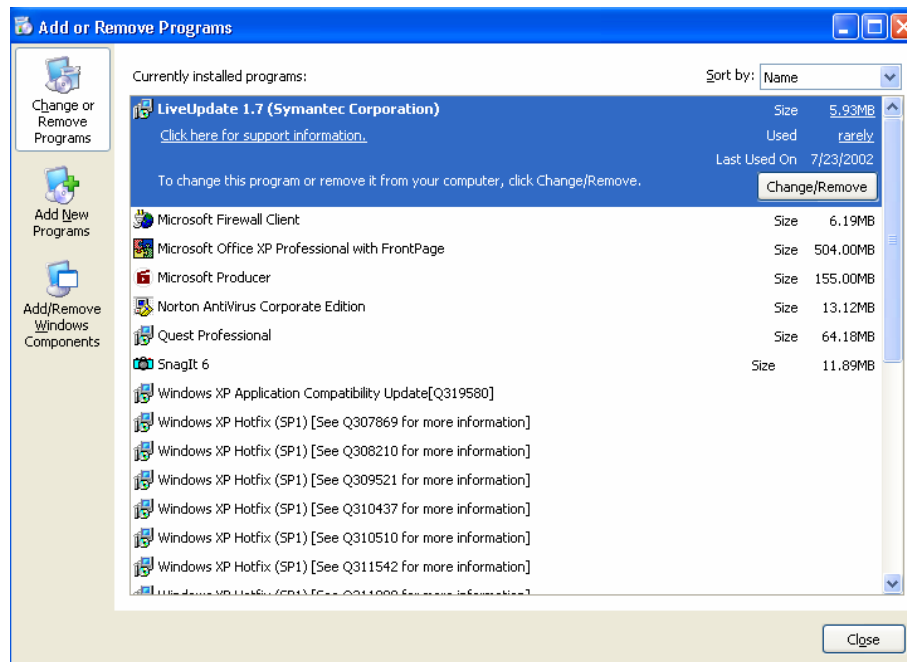
d.

7. Left-Click with the mouse on the [Close] button.

B. Rules

1. Application Overview

1. The following characters cannot be entered in any fields:
    a. ~
    b. ^
    c. |
2. Users should ensure their system's short date format is M\d\yyyy.
    a. In the Control Panel, go to Regional Settings.
    b. Click on the Date Tab
    c. Make sure the Short Date Format is M\d\yyyy.
3. Databases should never be placed in a folder where the path to the folder consists of any characters other then alphanumeric and/or spaces.

2. Network Application

2.1 General

1. The Master Active and Master Support Databases (PX07MA.kml, PX07MS.kml) must always be kept in the same location.
2. When User is going to create an export file, the export file will be created from the Local DB. The user will have the option to get latest from the Master DB at this time. Regardless of what the user selects, the export file will be created from the Local DB.
3. Changes to Contract Dates and Contract Documents will not affect changes to the Contract information kept in the Contract Table.
4. When user is in Quest Professional all support data displayed is from the Local Database.
5. When a user creates a project locally, Quest Professional checks the Master Database first for a duplicate PTS Code before allowing the project to be created locally.
6. When a user creates a contract for a project locally, Quest Professional checks the Master Database for a Contract already assigned to the project, before allowing the contract for the project to be created locally.
7. Project can NOT be uploaded to the Master if there are duplicate Job Specific Item Codes for a project in the Local Database.
    a. I.E. The Local deleted the Job Specific Item from the project and then created a new Job Specific Item with the same Item Code, but a different Description and or Unit of Measure. If a Job Specific Item is deleted from the local database and is recreated with the same Item Code but different Description and or Unit of Measure, the local machine should follow the below steps before deleting and recreating:
        i. Perform Get Master Data Function for the specific project.
        ii. Delete the Job Specific Item on the Local Machine.
        iii. Perform Update Master Data Function for the specific project.
        iv. Create the new Job Specific Item with the same Item Code but different Description and or Unit of Measure on the Local Machine.
        v. Perform Update Master Data Function for the specific project.

2.2 Advertising and Addendum

1. When the project is advertised, the Master Database is automatically updated and no other local machines will be able to advertise this same project.
2. When the user begins to set an addendum, the program will retrieve the latest version from the Master DB and overwrite what is on the local database with the Master Database Information.
3. When the user sets an addendum, the project will automatically check out from the Master Database
4. When the user posts an addendum, they must first check out the project.
5. Only 1 person can check out the project to post an addendum.

2.3 Update Master Data & Get Master Data

1. When the Update Master Data or the Get Master Data is executed, the only support data that is synced between the local and the master is the project dependent data.
2. When the Get Master Data function is executed, the entire Master Database is locked down until the function is completed.

2.1 Check-In/Check-Out

1. When a Project has been Checked-Out, only the User who has checked out the Project will be allowed to update the Master Database with Project information
2. When a Project has been Checked-Out, Get Master Data functionality will not be allowed for this Project

3. Quest Professional Installation

1. A Site ID must be unique for each machine. There cannot be more then one machine with the same Site ID as this can cause possible loss of data.
2. The installation uses Windows Installer
3. A machine may require a Windows Installer package to be installed first before installing Quest Professional. There is a folder provided for each operating system on the CD:
    a. Windows 98: Installer98 Folder
    b. Windows NT: InstallerNT Folder
    c. Windows 2000: Installer2k Folder
4. The Quest Professional Installation Package will work for the following Operating Systems:
    a. Windows 98 Second Edition (SE)
    b. Windows NT 4.0 SP 6
    c. Windows 2000
    d. Windows XP
5. Windows NT users must make sure the following items are installed on the computer:
    a. At least Internet Explorer 5.0 with at least Service Pack 2
    b. Service Pack 6 for NT
6. Windows 98 users must make sure the following items are installed on the computer:
    a. At least Internet Explorer 5.0 with at least Service Pack 2
7. If a message box appears stating that a file could not be installed or registered and to contact the system administrator, the user should click the IGNORE button for all these messages and the installation should resume.
8. There are two (2) types of Quest Professional Installations.
    a. Standalone
    b. Network

4. Projects

1. When a project is first created the required fields are:
   a. PTS Code
   b. Project Name
   c. Project Owner
   d. Default Dataset
2. When changes or additions are made to the project, the Save button must be clicked.
3. A project can contain multiple cities
4. The Project owner can be changed at any time.
   a. The changing of a project owner will not trigger the addendum process
5. The PTS code must be unique.
6. There can be only 1 active project with a unique PTS code.
7. The PTS Code can only contain alphanumeric characters and dashes (-).
8. PTS Code once entered cannot be modified. The project must be deleted and recreated with the correct PTS Code.

5. Item

1. An item cannot have a total negative quantity.
2. An item can be a Specialty Item
3. An item can be a DBE item.
4. An item can be a Specialty and a DBE item.
5. An item can be a part of an assembly and still have regular locations and stations.
6. The item quantity can be 0 pre-advertising.
7. All Lump Sum Item quantities must equal 1.
8. All non-Lump Sum Item Quantities must be equal to or greater then 1.
9. A project can not include duplicate item codes.
10. The Item's Engineer's Estimate Price can be $0.00 in pre-advertising.
11. To advertise the project or post an addendum, the Item's Engineer's estimate price must be greater then $0.00.
12. The purpose of the Default Improvement Type is meant as a user convenience.
    a. When locations are created for that item, the location's improvement type will default to the item's improvement type to allow easier data entry by the user.
    b. Otherwise, it has no significance. I.E. it is not used in funding calculations.
13. If the item has locations/stations, the item's total quantity is calculated by summing the item's location quantities.
14. If an item's location has stations, the location's quantity is determined by the sum of its stations.
15. The item's total price is calculated by multiplying the item's total quantity by the item's engineer's estimate price.
16. On the Item Details Grid, the user may enter a quantity value for an item only if there are no locations/stations for that item. If the item has locations/stations, the quantity value on the Item Details grid is not editable.
17. An item can have either a minimum or only acceptable bid price, but not both.
18. An item does not have to have a minimum or only acceptable bid price.
19. Items can be removed from a project at any time until bid files are imported to the project.
20. Specialty Items will have the sequence number preceded with an S (I.E. S004)
21. In addendum 0 (pre-advertising), sequence numbers are generated alphanumerically ascending by item code.
22. In Addendums greater then 0, the Sequence Numbers are generated alphanumerically ascending by item code for that addendum.
    Example 1:
    a. Addendum 0:
       001   Item A
       002   Item B
       003   Item C
       004   Item D
       005   Item E
       006   Item F

b. User deletes Item C. User now has:
    001   Item A
    002   Item B
    003   Item D
    004   Item E
    005   Item F

c. User re-adds Item C in Addendum 1. User now has:
    001   Item A
    002   Item B
    003   Item D
    004   Item E
    005   Item F
    006   Item C

23. 02.04.16 Rules Meeting: Items re-added (Addendum > 0) or undeleted (Pre-Advertising) to a project will receive original sequence Number when it was first added. The sequence number is not regenerated.

Example:
Addendum 0:
    001   Item A
    002   Item B
    003   Item C
    004   Item D
    005   Item E
    006   Item F

User deletes Item D in Addendum 1.
    001   Item A
    002   Item B
    003   Item C
    004   "Item Deleted"
    005   Item E
    006   Item F

User re-adds Item D in Addendum 2
    001   Item A
    002   Item B
    003   Item C
    004   Item D
    005   Item E
    006   Item F

24. When an item is re-added:
    a.   The item's default improvement type value will be empty.

      b.   The Item quantity will be recalculated based on the sub item quantities.

      c.   When an item is re-added, the Engineer's Estimate Price is $0.00.

      d.   When an item is re-added, if the item was in an assembly before it was originally deleted, the item will NOT be re-added to that assembly.

25. When an item is re-added, the following is re-added with the item:
    a. Minimum acceptable bid price (if applicable)
    b. Only Acceptable Bid Price (if applicable)
    c. Specialty Value
    d. DBE Value
    e. Justification Value

26. If an item is added to a project that is outside of permission ranges for a user, the item will default to read/write permissions.

    Example:
    a. User A has Read/Write Permissions for item codes 201.0302 to 701.7715.
    b. They are locked from items 808.1621 to 901.0121.
    c. Item 905.0117 is added to the project.
    d. Because the permission ranges specified for User A do not include this item added, User A will have read/write permissions to this item until otherwise specified.

27. If an item is re-added in addendum 0, the previous information (locations, stations, etc.) for that item will not be re-added.

6. Job Specific Item

1. The Job Specific Items Description cannot be changed after the project has been advertised. If the user needs to change it, they will have to delete it and then reenter it with the new description.
2. There cannot be duplicate job specific Item codes in the same project.
3. A job specific item can be a Specialty Item
4. A job specific item can be a DBE item.
5. A Job specific item can be a specialty and a DBE item.
6. A Job Specific Item can be part of an assembly.
7. The format for the Job specific Item Code is AAA.99NN.
   A= Alphanumeric   N = Numeric
8. A Job Specific Item cannot be part of an assembly template.
9. Job Specific Items can be created with non-sequential item codes.
10. A Job Specific Item must contain an item code, Unit of Measure, and a description to be created.
11. A Job Specific Item can be removed from a project at any time until bid files are imported.
12. When a user creates a Job Specific Item and deletes it, the deleted flag is checked.
13. If user creates a Job Specific Item with the Item Code of a previously deleted Job Specific Item for the same project, the record for this Item in the PRJITEMS table will have the deleted flag unchecked and the record information will be overwritten with the new Job Specific Item information.
14. When a Job Specific Item is restored (adding it through the Mark Undeleted Button or the Add/Remove Items Screen), only the sub items for that Item ID that existed (deleted flag not checked) when the Item was deleted will be restored with the Job Specific Item
    a. Assembly Sub Items are not restored with the Job Specific Item.
15. If a Job Specific item is re-added in addendum 0, the previous information (locations, stations, etc.) for that item will not be re-added.

7. Sign Item

1. A sign item can have regular locations/stations.
2. A sign item can be a DBE item.
3. A sign item can be a specialty item.
4. A Sign item can be a specialty and DBE item.
5. A Sign item can have a minimum or only acceptable bid price, but never both.
6. A sign item does not have to have a minimum or only acceptable bid price.
7. Sign items are actually the structure to hold the sign.
8. All Sign Item Calculations, Types, etc. are defined by the Federal Government as mandated. Refer to http://mutcd.fhwa.dot.gov/ and http://members.aol.com/rcmoeur/signman.html for more information.
9. Once a sign sub item is added through the "Add Sign" dialog box, it cannot be edited. The user must delete the sign item and start over again.

8. Location/Station

1. The user will receive a prompt for the location or station word in the box when user begins to type the word in the grid if there are similar location or station descriptions.
2. Drop downs are provided for location and station description entry in the location/station grid.
3. When user selects an improvement type for a location or station the FAP number will automatically fill. If there is more then 1 FAP number for that improvement type, user will be given a list of FAP numbers to select.
4. A Location/Station can have a negative quantity as long as the total quantity for the item is positive. This applies to both assembly locations/stations and regular locations/stations.
5. User is prevented from assigning negative value at the location/station level that will cause the item's total quantity to be negative.
6. User cannot insert a duplicate location for an item or a duplicate station for a location.
   a.   This is for regular items and for assemblies. If user attempts to do this, they will receive a msg. box notifying them of the duplicate and will be prevented from adding the duplicate sub item.
   b.   Programmatically, this check is in the insert code. The edit code will only check when the description is edited.
   c.   If user has imported files and now has duplicate stations and the user changes information (qty, improvement type, FAP), they are not notified of the duplicate stations.
7. If an item has a default improvement type, the locations for that item will default to the item's default improvement type. However, the user is allowed to select a different improvement type for the location.
8. If a location has its improvement type set, the corresponding stations when created will default to its locations improvement type. This information can be changed by the user.
9. If a location has its FAP set, the corresponding stations when created will default to its locations FAP. This information can be changed by the user.
10. If a location is assigned to several regular items (non-assembly), changes made to the location at one item will not affect the same location under other items.
    Example:
    Item A
          Location A

    Item B
          Location A

    a. User deletes Location A from Item A.
    b. Item B will still keep Location A

11. If a location contains stations, the location's quantity value and the location's funding information cannot be edited. The location description however can be edited.
12. The location quantity equals the sum of all corresponding stations.
13. The locations/stations for an item can all have different improvement types and FAP numbers.
    Example:

    Location A   A000   FAP 123-456 (002)
           Station A   B000   FAP 678-543 (001)
           Station B   A000   FAP 123-456 (002)
    Location B   D000   FAP 678-543 (001)

14. Funding totals are determined at the lowest level of an item. I.E. If a location has stations, funding is determined by the stations and no consideration is given to the location's improvement type/FAP Number.
15. Funding is based on locations/station and not the item's default improvement type.
16. For pre-advertising all item and location/station changes are not tracked.
17. If an item belongs to an assembly, to remove the item from the project, it must be removed through the assembly first and then removed from the item details grid.
    a. If the user attempts to delete the item first through the project, they will receive a message box notifying them to first remove it from the assembly.
18. If an item has regular sub items in pre-advertising:
    a. User deletes the item and the item is totally removed along with corresponding locations/stations from the project.
    b. Should the user re add this item in pre-advertising, <u>ALL</u> previously existing regular sub items are re-added to this item.
    c. Should the user re add this item in an addendum, <u>ALL</u> regular sub items that existed ONLY in the previous addendum are re-added to this item.
       Example 1:
          i. Addendum 0: Item A has Location 1, Location 2, Location 3, Location 4, Location 5, Location 6, Location 7. The user removes Locations 5, Location 6, and Location 7 before advertising.
          ii. The user removes Item A in Addendum 1.
          iii. The user adds Item A in Addendum 2. Item A is re-added with Location 1, Location 2, Location 3, and Location 4.
       Example 2:
          i. Addendum 0: Item A has Location 1, Location 2, Location 3, Location 4, Location 5, Location 6, Location 7. The user deleted Location 5, Location 6, and Location 7. User then deletes Item A.
          ii. Addendum 1: User re-adds the item and the user will receive Item A with Location 1, Location 2, Location 3, and Location 4
19. It only possible to restore and un-delete to regular (non-assembly) items and regular (non-assembly) locations/stations.

9. Assembly

1. The user must be able to enter a depth value for an assembly item.
2. The depth value is string type.
3. The factor value for an assembly item extends up to 5 decimal places.
4. The factor value must be positive.
5. An Assembly must have items to advertise the project or post an addendum.
6. An Assembly must have locations to advertise the project or post an addendum.
7. An assembly does not require stations, but can have them.
8. If an assembly's location has corresponding stations, the assembly location quantity value must equal the sum of the corresponding stations.
9. Assembly location and stations can only be removed from the project through the assembly. I.E. they cannot be removed on the Project Details Tab under an item in the assembly.
10. If an assembly is removed from the project, the items are left in the project. The items however will not have the assembly locations and stations associated with it.
11. An Assembly item can be assigned regular locations and stations. (I.E. non-assembly locations/stations).
    a. Regular Stations cannot be assigned to assembly locations.
12. The regular locations and stations can only be assigned in the Project Details Tab and not in the assembly screen.
13. Assembly Items can be Job Specific Items.
14. Assembly Items can be Specialty Items.
15. Assembly Items can be DBE Items.
16. A distinct assembly is defined by its name and unit of measure.
17. Duplicate assemblies are not allowed in a project. (I.E. Assembly Name and Unit of Measure)
18. Funding can only be assigned to assembly locations/stations in the Project Details Tab under each assembly item.
19. An assembly can contain no items and/or locations/stations pre-advertising.
20. An assembly location cannot have regular stations.
21. Assemblies cannot be re-added.
22. If an item is removed from the assembly, the item will stay in the project but will not have the assembly locations/stations assigned to it.
    a. Deleted flag is checked for the item in that specific assembly in the ASMITEMS table
    b. Deleted Flag is checked for the assembly locations/stations for that item in the SUBITEMS Table.
    c. The location/station from the assembly will be removed for the deleted item in the DOQ table.
23. If an assembly is removed from a project, the items will stay in the project, but without the Assembly Locations/Stations.
    a. Deleted Flag is checked for the location/station in the SUBITEMS table for the assembly items.
    b. Deleted Flag is checked for the items in the ASMITEMS table.

   c. Deleted Flag is checked for the Assembly in the PRJASSEMBLY Table.

   d. Deleted Flag is checked for the location/station in the ASMSUBITEMS table.

   e. The location/station will be removed from the DOQ table for the assembly items.

24. If a location/station is removed from an assembly

25. When assembly is created, user must enter the required fields consisting of:

   a. Assembly Name

   b. Assembly Unit of Measure

   c. Assembly Code

26. The assembly Code must be 5 alphanumeric characters in length

27. All Locations and Stations for a particular assembly will have the Assembly Code in parentheses () at the end of their description for an item. I.E.:

   a. 201.0401 is part of Assembly A, Assembly Code (ASMBA).

   b. This assembly has A Location 1.

   c. In the DOQ report, 201.0401 will display this location as "A Location 1 (ASMBA)"

28. The Assembly Code cannot be edited once entered by the user.

29. Assemblies cannot have a Unit of Measure of LS

30. Assemblies cannot include any Items that have a Unit of Measure of LS.

10. Import/Export– Between Quest Professional Sites

** Consultant 1 and Consultant 2 have different Site ID's.

General Overview:
1. All deleted records (excluding reference data not related to the project) will be exported.
2. When any change, addition, or deletion is accepted, the DATELAST MODFIED value will be updated from the machine importing the information.
3. Accept All will only import the deleted records that match between the Import File and the User's DB.

Regular Items:
1. If an item is deleted at one Quest Professional Site and exported to another Quest Professional Site that currently has this same item as undeleted in the same project the following will happen:
    a. If the user chooses to accept all changes for the project: The item and any corresponding locations/stations for that item are deleted.
    b. If the user chooses view changes in the Comparison Screen: The item and any corresponding locations/stations for that item are displayed in red and the user may choose to accept the deleted item and corresponding locations/stations.

    For Example:
    Consultant 1 created Item A and exports the project to Consultant 2. Consultant 2 deletes Item A and exports back to Consultant 1.
    a. Consultant 1 chooses to accept all changes to the project. Item A and its corresponding locations/stations will be deleted from the project.
    b. Consultant 1 chooses to view all changes through the comparison screen. Consultant 1 will see that this item and its corresponding locations/stations are deleted and Consultant 1 may decide on accepting the deleted item and locations/stations.

2. If an item is deleted at one Quest Professional Site and exported to another Quest Professional Site that currently has this same item as undeleted in the same project and this item is also part of an assembly the following will happen:
    a. If the user chooses to accept all changes for the project: The item and any corresponding locations/stations for that item are deleted. The item is also removed from any assemblies that it was part of.
    b. If the user chooses view changes in the Comparison Screen: The item and any corresponding locations/stations for that item are displayed in red and the user may choose to accept the deleted item and corresponding locations/stations. The item is also marked red for the assembly it is part of. If the user accepts the deleted item, the item and any corresponding

locations/station are removed from the project and the item will also be removed from the assemblies it is part of.

3. When user accepts a deleted item:
    a. Check the deleted flag for the deleted item from any corresponding assemblies in the PRJASMITEMS table.
    b. Check the deleted flag for all corresponding assembly locations/stations for the deleted item in the SUBITEMS table.
    c. Check the deleted flag for corresponding regular locations/stations for the deleted item in the SUBITEMS table.
    d. Check the deleted flag for this item in PRJITEMS.
    e. Check the deleted flag for any sign sub items in the SIGN SUBITEMS table for this item.

Locations/Stations:
1. Locations are compared by the location's description.
    For Example:
    Consultant 1:
        Item A
            Loc A
                Sta 10 = 10
                Sta 20 = 20
    Consultant 2:
        Item A
            Loc A
                Sta A = 10
                Sta B = 20

    Consultant 1 imports from Consultant 2. Because the location descriptions match Consultant 1 will now have:
        Item A
            Loc A
                Sta 10 = 10
                Sta 20 = 20
                Sta A = 10
                Sta B = 20

2. If a Quest Professional user has a location with stations and imports a location with the same description, without stations, and a different quantity, the following occurs:
    a. The user chooses to accept all information. The location without stations will be imported, but the current station quantities will not be removed. The location's quantity is recalculated using the station quantities.
    b. The user chooses to view all project changes through the comparison screen. The user will see this location as yellow due to the difference in quantity and stations. If the user accepts the change, the location without

stations will be imported, but the current station quantities will not be removed. The location's quantity is recalculated using the station quantities.

For Example:
Consultant1
      Item A
            Loc A = 90
                  Sta 10 = 10
                  Sta 20 = 80

Consultant 2
      Item A
            Loc A = 50

Consultant 1 imports from Consultant 2.

a. Consultant 1 chooses to accept all project data. The qty change for the location is accepted. The location quantity is recalculated using the stations quantities and the location's quantity is changed back to 90.
b. Consultant 1 chooses to view the project changes in the comparison screen. The screen displays the item as yellow due to the quantity change. If Consultant 1 was to accept this qty change, the qty change for the location is accepted. The location quantity is then recalculated using the stations quantities and the location's quantity is changed back to 90.

3. Stations for a specific location are compared by Network ID.
    a. If the Network ID's match:
        i. If the user chooses to accept all project information, the station description and qty is overwritten with the imported file's station description and quantity
        ii. If the user chooses to view project changes through the comparison screen, the station would be yellow. If the user accepts the change, the quantity would be changed to the imported file quantity.
    b. If Network Id's do not match:
        i. If the user chooses to accept all project changes, there will be duplicate stations for that location.
        ii. If the user chooses to view the project changes through the comparison screen, the station will be green. If the user accepts this new station, there will be duplicate stations for that location.
    Example:
    Consultant 1:
        Item A
            Loc A
                Sta 10 = 10
                Sta 20 = 20

Sta A = 10
Sta B = 20

Consultant 2:
      Item A
          Loc A
              Sta 20 = 20

Consultant 1 imports from Consultant 2.

If the network ID's do not match, Consultant 1 will now have duplicate stations as seen below:

Item A
      Loc A
          Sta 10 = 10
          Sta 20 = 20
          Sta A = 10
          Sta B = 20
          Sta 20 = 20

4. If a user has a location without stations and imports a location with the same description, has stations, and a different quantity, the following occurs:
   a. The user chooses to accept all project information. The location descriptions are compared. Because they match, the location is imported with the corresponding stations and overwrites the current location. The location quantity is recalculated based on the stations quantities.
   b. The user chooses to use the comparison screen to view the project information changes. The location will be yellow and the corresponding stations will be green. If the user chooses to accept the location, because the location descriptions match, the location is imported with the corresponding stations and overwrites the current location. The location quantity is recalculated based on the stations quantities.

Example:
Consultant 1
      Loc A = 110

Consultant 2
      Loc A = 90
          Sta A = 40
          Sta B = 50
Consultant 1 imports Consultant 2.
   a. Consultant 1 chooses to accept all changes. Because the location descriptions match, Consultant 2's Loc A with corresponding stations overwrites Consultant 1's Loc A. Loc A quantity is recalculated with the new stations quantities.

   b. Consultant 1 chooses to view the changes through the comparison screen. Loc A would be yellow. Sta A and Sta B would be green under Loc A. Consultant 1 chooses to accept Consultant 2's Loc A and corresponding stations. Consultant 2's Loc A with corresponding stations overwrites Consultant 1's Loc A. Loc A quantity is recalculated with the new stations quantities.
5. When a deleted location/station for an item is accepted through import, the deleted flag for the item's location/station is checked in the SUBITEMS table.

Job Specific Items:
1. Job Specific Items are compared by Item Code, Description, and UM (Unit of Measure).
   a. If an import file contains a job specific item that has the same item code as the current project, but the description and/or UM are different, the user will be prevented from importing the project because of the duplicate Job Specific Item Codes.
   b. The user will receive a message box notifying them of the situation.
   c. The user will need to work this situation out with the other Quest Professional Site user to work out the Job Specific Item Code situation.

Sign Sub Items:
1. When the user accepts a deleted Sign Sub Item for a Sign Item:
   a. Check the deleted flag for the Sign Sub Item in the SUBITEMS table for that item.
   b. Check the deleted flag for the Sign Sub Item in the SIGNSUBITEMS table for that item.

Assemblies:
1. An assembly is compared by Description and UM (Unit of Measure).
   a. The code to compare the assembly descriptions can have ability to adjust spacing and case type in comparing descriptions. (I.E. Consultant 1 typed "Assembly a" & Consultant 2 typed "Assembly A". The code will realize that Consultant 1 had an extra space and a lower case 'a', but these are the same assembly)

2. Assembly Items are compared by Item Code
3. Assembly Locations are compared by Description

Funding:
1. The combination of an Improvement type and FAP number must be unique.
2. Importing deleted Item Improvement types/FAP Numbers.
   a. The user chooses to accept all the project information.
      1. All location/stations with that Improvement type/FAP Number will now have empty values for the Improvement type and FAP number.

2. Items that had no location/stations, but did have the deleted Improvement type as the default Improvement type will have an empty default Improvement type.
   i. The exception is if the Improvement type exists in another Improvement type/FAP Number combination. In this case, the item's default Improvement type will remain.
b. The user chooses to view the project information through the comparison screen.
   1. The Improvement type/FAP number will be marked as red.
   2. The user accepts this deletion.
      i. All location/stations that currently have the Improvement type/FAP number combination will have empty values for the improvement type and FAP in the SUBITEMS table.
   3. Items that have no location/stations, but did have the deleted Improvement type as the default Improvement type will have an empty default Improvement type in the PRJITEMS table.
      i. The exception is if the Improvement type exists in another Improvement type/FAP Number combination. In this case, the item's default Improvement type will remain in the PRJITEMS table.

Example 1:
a. Consultant 1 exports a file to Consultant 2 with a combination of FEMA/FAP 123-456. FEMA is not part of another Improvement type/FAP Number combination.
b. Consultant 1 meanwhile adds a new item (Item 50) with the default improvement type FEMA.
c. Consultant 2 deletes FEMA/FAP 123-456 from the project.
d. Consultant 1 imports Consultant 2's project file.
e. Consultant 1 chooses to accept all project changes. FEMA/FAP 123-456 is removed from the funding. Item 50 will now have no default improvement type.
f. Consultant 1 chooses to view the project changes through the comparison screen. FEMA/FAP 123-are displayed as red. Item 50 will be yellow in the Item Node because its default improvement type has been changed to nothing.
g. If Consultant 1 chooses to accept the deletion of FEMA/FAP 123-456, it is removed from funding and Item 50 will now have no default improvement type.

Example 2:
Funding:
Improvement type A000   FAPNUMBER: FAP123
Improvement type A000   FAPNUMBER: FAP456

Item and Location/Station Information:

Item A   A000
    Loc A A000 FAP 123
    Loc B A000 FAP 456

Item B   A000

Item C   A000
    Loc A A000 FAP 456

Improvement type A000/FAP NUMBER FAP 456 is removed from the project.

Item A   A000
    Loc A A000 FAP 123
    Loc B   → Empty Values

Item B   A000

Item C   A000
    Loc A   → Empty Values

The default improvement type of A000 for each item will stay because there is another Improvement type/FAP combination using the improvement type A000.

Example 3:
    Funding:
        Improvement type A000   FAPNUMBER: FAP123

        Item and Location/Station Information:
        Item A   A000
            Loc A A000 FAP 123
            Loc B A000 FAP 123

        Item B   A000

        Item C   A000
            Loc A A000 FAP 123

        Improvement type A000 FAP NUMBER FAP 123 is removed from the project.

        Item A   → No Default Improvement type
            Loc A   → Empty Values
            Loc B   → Empty Values

        Item B   → No Default Improvement type

Item C   → No Default Improvement type
            Loc A   → Empty Values

3. 02.03.13 Reviewing of Recap Maguire Meeting (02.03.08): If a location/station is to be imported with an Improvement type/FAP Number that the project currently does not contain.
   a. The user chooses to accept all project information. All Funding changes (Improvement types and FAP Numbers) will be imported first and the location/station will be imported with the correct Improvement type/FAP Number.
   b. The user chooses to view the project changes through the comparison screen.
      i. The user will be prompted with a message suggesting that they first import the funding source changes.
      ii. If they decide to continue importing items and locations/stations before funding, the location/station will be imported without the Improvement type/FAP Number.
      iii. If the user later imports the funding changes, the location/station will still exist without a Improvement type/FAP Number.

4. When user accepts a deleted Improvement type/FAP Number:
   a. All SUBITEMS rows with the improvement type/FAP combination will have an empty value for the improvement type and FAP.
   b. All PRJITEMS that have the improvement type as the default improvement type will have the field set to nothing.

Projects:
   1. If user chooses to accept all project information, all project information (items, contract, assemblies, etc.) will be imported.
   2. If user chooses to view information through the comparison screen.
      a. User selects "Accept Record". Just the project record and dependent information (Contract Information, Contract Dates, Addendum Information, BEInfo) will be accepted.
      b. User selects "Accept All". All project information (items, contract, assemblies, etc.) will be imported.

Contracts:
   1. 02.04.01 Quest Status Meeting: Contract # is unique and will be used for comparison.
   2. 02.04.01 Quest Status Meeting: If the contract numbers match and the user chooses to accept all for the project information, the current contract information will be overwritten by the imported file.

Project Team:
1. In project team, the team member names are transferred, but not the permissions. Permissions are Site Specific.
   Example:
      a. If Consultant 1 adds Team Member A and exports to Consultant 2, Team Member A will be on Site 2, but the permissions will not carry to Site 2.
      b. If Site 2 Exports back to Site 1, Team Member A's permissions on Site 1 will not be overwritten or deleted. They should stay as Site 1 Owner defined.
2. If a team member is removed from a project and then re-added later, the permissions have to be set again by the user. The program will not recall them.

Advertising:
1. Once the project has been advertised, importing Quest Professional Files from other sites will be done without the comparison screen (like the Restore function). The project will be completely overwritten each time it is imported.

Addendum:
1. If a project is being imported that is a lower addendum number than the machine that is importing, the importing will be denied. The user must first delete their project or the exporting machine must update to the correct addendum number.
2. If a project is being imported that is a higher addendum number than the machine that is importing, importing Quest Professional Files from other sites will be done without the comparison screen (like the Restore function). The project will be completely overwritten with the new file.

Reference Data:
1. The only information from the Support Data that will be included in the export of the project file is information related to the project. (I.E. If a city is added to the City Reference Table and included in a project and this project is then exported to another consultant, the consultant will import this new city to their reference table as well.)
2. If Support data is updated and then applied to a project, the information will overwrite the importing consultant's Support Data with the updated row.

Datasets:
1. Deleted Datasets are not exported.

11. Import/Export– Between Quest Professional & Quest Server

1. Quest Pro can export a project file (without bidder information) to be imported to Quest Server.

12. Import/Export – Between Quest Professional & Quest Lite

1. Quest Professional has the ability to export bid files to be distributed to Quest Lite
2. Quest Professional cannot accept Bid Files generated by Quest Lite.

13. Import/Export - Support Data

1. The import of Support Data only updates the tables.

14. Comparison Screen

1. Parent Nodes are the main nodes viewed on the comparison screen for a project. They are the following:
   a. Items
   b. Sign SUBITEMS
   c. CONTRACT
   d. Project
   e. Funding
   f. Project Team
   g. City
   h. County
   i. Sub Items
   j. Assemblies
2. Legend:
   a. Yellow: A value has changed
   b. Green: Newly added.
   c. Red: Has been deleted.
3. If an item is part of an assembly and the item is accepted through the Items Parent Node before the assembly is accepted:
   a. User will receive a message asking if they want the assembly(s) that the item is part of to be accepted as well. If user says yes, then all assemblies that item is part of will be imported.
4. An Item may be marked as yellow because the quantity value is different due to location/station changes, additions, and deletions. The user cannot accept at the item level the quantity change. This can only be done through accepting the location and stations.
5. A location/station is accepted through the Sub Items Parent Node. It is also part of an assembly.
   a. User will receive a message asking if they want assembly(s) that the location/station is part of to be accepted as well. If user says yes, then all assemblies that location/station is also part of will be imported.
6. A sign item is accepted through the Items Parent node. It is also part of an assembly.
   a. User will receive a message asking if they want assembly(s) that the sign item is part of to be accepted as well. If user says yes, then all assemblies that sign item is part of will be imported.
7. If project is new and has not been accepted and the user clicks on a parent node (Items, Contract, etc.) and accepts some information, the project and its dependent information (Contract Information, Contract Dates, Addendum Information, BEInfo) will automatically be accepted.
8. If a Sign Sub Item is accepted through the Sign Sub Items Parent Node, the same sign sub item will be removed from the Items Parent Node.
9. If a Sign Sub Item is accepted through the Items Node, the same sign sub item will be removed from the Sign Sub Items Parent Node.
10. The only deleted records that will be imported are the ones that match between

sites.
Example:
Consultant 1:
Item A
        Location A
                Station A
                Station B

Consultant 2:
Item A
        Location A
                Station A
                Station B
                Station C
                Station D

   a. Consultant 2 deletes Station B and Station C from Item A's Location A.
   b. Consultant 1 imports the project and views in the comparison screen the
      following:
      Item A ← Yellow
            Location A ←Yellow
                    Station B ←Red
                    Station D ←Green
   c. Station C is not shown because Consultant 1 never had this station for
      Item A's Location A.
11. When an item or location is deleted and it matches between sites, the locations or
    stations will also be imported regardless if they match.
    Example:
    Consultant 1:
    Item A
        Location A
                Station A
                Station B

    Consultant 2:
    Item A
        Location A
                Station A
                Station B
                Station C
                Station D

   a. Consultant 2 deletes Item A's Location A.
   b. Consultant 1 imports the project and views in the comparison screen the
      following:
      Item A ← Yellow

Location A ←Red
Station A ←Red
Station B←Red
Station C←Red
Station D←Red

   c. Because Consultant 1 and Consultant 2 had matching locations, Station C and Station D are imported with the deleted Location A even though Consultant 1 never had these stations for Item A's Location A.

12. If user clicks on a parent node and then selects "Accept All" from the file menu, all information for that parent node will be accepted for the project.
Example 1:
Click on the Items Parent Node and select "Accept All". All changed item information for that project will be imported to the project.

Example 2:
A New Location and a corresponding station is marked green under an item. User clicks on the Location Node. User selects "Accept All". The newly added Location with its corresponding station is added to the item in the project. If the user had just selected "Accept New Record", just the location with the quantity value would have been added to the item.

13. Comparison will only display the deleted records that match between the Import File and the User's DB.

14. Comparison Screen will only display the deleted records if the parent matches and it was deleted. The Existing Value column is empty for the unmatched records. I.E.:
   a. Site B adds Station A-5 to Location A for Item A
   b. Site B then deletes Location A for Item A
   c. Site B exports and Site A imports
   d. Site A will see in the comparison screen Location A for Item A is red. Under Location A will be ALL stations including Station A-5 even though Site B never had Station A-5 for Item A's Location A.

15. Datasets Tab:
   a. User can only accept the entire dataset and not specific rows from the dataset.
   b. The user will be able to view all the contents of the dataset before accepting the dataset.
   c. If the dataset is accepted and the name matches the name of a dataset already in the project, the user will be prompted to change the name of the dataset being imported. There is no overwriting of datasets.

15. Backup & Restore

1. When a backup file is created, it can only be restored on the same machine.
    a. A backup file created on one machine cannot be restored on a different machine.
    b. If the user wants to transfer files between machines, the import/export function must be used.
2. When the user selects a contract to backup, the backup file will be a .zip file saved in the user-specified folder.
3. The Backup function only creates a file for a specified project. It does not backup the entire database or the support information (reference tables).
4. Restore will completely overwrite the specified project in the database with the backup file information.
5. Restore will not overwrite other project information or support information.
6. A lower addendum cannot be restored over a higher addendum for a project. If user attempts to restore addendum 1 over addendum 2, they will receive a message notifying them that this is not allowed.
7. When a project is restored, all rows in the project tables are removed. The tables are then repopulated with the information in the .zip file being restored.
8. For Job Specific Items, the Backup function will only backup the active (undeleted) Job Specific Items and the corresponding sub items.

16. Funding

1. In the Funding Screen, click on a improvement type & the total dollar amount applied to that Improvement type/FAP number combination will show at the bottom right of the screen. This is the same for the sub funding row.
2. Sequence Number for improvement types should be shown.
   a. The sequence number. is based on improvement type and used only for sorting
   b. The funding sequence number is not editable by the user.
3. Each Improvement type/FAP Number combination must total 100%.
4. An Improvement type/FAP Number combination can have an E&C% value from 0 to 100 unless the improvement type that is specified in the Support Tab Improvement Types folder is marked yes for ECONLY. If ECONLY is marked yes, the E&C% value can only be 0.
5. Funding type "Other" is the only type that can be broken out into sub-funding groups.
6. When creating sub-funding groups, the Improvement type/FAP Number combination of the Parent funding group is the default and cannot be changed. For Example:

   Improvement type = A001
   FAP Number: FAP001
   Funding Type: Other
   Percentage: 10%

   The Sub-funding groups for this will all have the IMPROVEMENT TYPE A001 & FAP Number FAP001.

7. The only editable information for a sub-funding group is the description and the percentage.
8. The sub-funding groups must total 100%
9. When an Improvement type/FAP Number combination is deleted, the change cascades through all items and locations/stations.
   a. If there was only 1 instance of that improvement type in the Funding Screen, the item's default Improvement type will be empty if it contained that improvement type.
   b. If there was only 1 instance of that improvement type in the Funding Screen, the Location's and Station's Improvement type & FAP Number will be empty if it contained that improvement type/FAP.
   c. If there was more then 1 instance of that improvement type in the Funding Screen, the Item's Default Improvement type will stay the same for that improvement type.
   d. If there was more then 1 instance of that improvement type in the Funding Screen, the FAP Number is removed and the Improvement type is left for the locations and stations.

10. When the FAP number is edited for an Improvement type/FAP Number combination, the user will be asked if they want this change to cascade through the project.
    a. Yes: All locations/stations with the Improvement type/FAP Number combination will have the FAP number updated.
    b. No: the FAP number is empty for each location/station containing that Improvement type/FAP Number combination
11. There is no cascading of Improvement type changes through the project.
12. Can only have 1 FAP for each improvement type, FAP can have many improvement types

17. Contracts

1. When a contract is first created the required fields are:
   a. RIC No
   b. Contract Name
   c. Contract Description
   d. Contract Type
2. The contract number can only contain alphanumeric characters and dashes (-).
3. When a contract is being advertised the required fields for the contract are:
   a. Contract Number
   b. Contract Description
   c. Contract Limits
   d. Place of Pre-Bid
   e. Time of Pre-Bid
   f. Plans Charge
   g. Proposal Read Time
   h. Bid Deadline Time
   i. Undersigned Bidder Statement
   j. Bid Package Description
   k. Appendices Description (If there are no appendices, then enter "Not Applicable")
   l. Contract Required Dates - The required contract dates for the program can be determined by the Contract Dates Folder on the Support Tab. The Contract Required Field will have the value of Yes for all required Date Types. The program is installed with the following default required Contract Dates:
      i. Bid Deadline
      ii. Bid Examine
      iii. Bid-Opening
      iv. Final Completion
      v. Pre-Bid
      vi. Proposal Read
4. There can only be one contract for each project.
5. When changes or additions are made to the contract, the Save button must be pressed.
6. There can only be 1 active contract with a unique RIC number in the Quest program.
7. Contracts can only be of construction type.
8. DBE % must be between 0 and 100.
9. Date Mask: MM/DD/YY
10. Time Mask: HH:MM AM/PM
11. Contract Document information cannot be edited.
12. Once the RIC# is created, it cannot be modified in anyway. The Contract must be deleted and recreated this time using the correct RIC #.

18. Advertising a Project

1. A Contract must exist to advertise the project.
2. Contract Number must be entered to advertise the project.
3. Contract Description must be entered to advertise the project.
4. Contract Limits must be entered to advertise the project.
5. Place of Pre-Bid must be entered to advertise the project.
6. Time of Pre-Bid must be entered to advertise the project.
7. Plans Charge must be entered to advertise the project.
8. Proposal Read Time must be entered to advertise the project.
9. Bid Deadline Time must be entered to advertise the project.
10. Undersigned Bidder Statement must be entered to advertise the project.
11. Bid Package Description must be entered to advertise the project.
12. Appendices Description must be entered to advertise the project. (If there are no appendices, then enter "Not Applicable")
13. Contract Required Dates must be set to advertise the project. The required contract dates for the program can be determined by the Contract Dates Folder on the Support Tab. The Contract Required Field will have the value of Yes for all required Date Types. The program is installed with the following default required Contract Dates:
    a. Bid Deadline
    b. Bid Examine
    c. Bid-Opening
    d. Final Completion
    e. Pre-Bid
    f. Proposal Read
14. All Locations/Stations must have an improvement type/FAP to advertise the project. In the case of a location not having the required funding information, if the location does have corresponding stations with their required funding information, the requirement has been met.
15. All Improvement types must have a corresponding FAP Number to advertise the project.
16. All Locations/Stations must have a quantity value other then zero (0) to advertise the project. A negative quantity is fine as long as it does not cause the item to have a total negative quantity.
17. All Items must have a quantity value greater then zero (0) to advertise the project.
18. All Items must have an Engineer's Estimate Price greater then zero (0) to advertise the project.
19. A contract does not require Contract Documents to be included in order to advertise.
20. The DOQ Report does not have to be viewed in order to complete the advertising process, but is suggested.
21. The DOQ table does not change when a project is advertised.
22. When the contract is advertised, all items, locations, and stations are locked from all users for the project.
23. When user Sets the Addendum the program will check to make sure that no one

else has the Project Checked out. If this is True then the project will be locked in the Master Database from all other users.

24. When user Posts the Addendum the below steps occur:
    a. The Master Database is locked from all users
    b. The Local machine will overwritten with the Master Database's Project Data
    c. Posting addendum procedures will execute on the local machine
        i.   If the procedures execute without error:
            1. The Master Database will be updated with the posted addendum
            2. The Master Database is unlocked to all users.
        ii. If the procedures execute with an error:
            1. The Master Database is unlocked to all users.
            2. Exit Advertising process on local machine
25. When User Advertises a Project the following occurs:
    a. Master Database is locked from all users during the advertising process of the program.
    b. The local machine's project will be overwritten with the Master Database's project data.
    c. Advertising procedures will execute on the local machine
    d. If there are no errors in the Advertising Procedure:
        i.   The Master Database will be updated with the posted addendum
        ii. The Master DB is unlocked from the users.
    e. If there are errors in the Advertising Procedure:
        i.   The Master DB is unlocked from the users
        ii. Exit Advertising process
26. If a User wishes to edit/update a Project which is in an Addendum, the User must check the Project out first! Changes made to a Project in an Addendum *that has not been checked-out* will be lost.

19. Setting & Posting an Addendum

1. A Contract must exist for the project to post an addendum.
2. Contract Number must be entered to post an addendum.
3. Contract Description must be entered to post an addendum.
4. Contract Limits must be entered to post an addendum.
5. Place of Pre-Bid must be entered to post an addendum.
6. Time of Pre-Bid must be entered to post an addendum.
7. Plans Charge must be entered to post an addendum.
8. Proposal Read Time must be entered to post an addendum.
9. Bid Deadline Time must be entered to post an addendum.
10. Undersigned Bidder Statement must be entered to post an addendum.
11. Bid Package Description must be entered to post an addendum.
12. Appendices Description must be entered to post an addendum. (If there are no appendices, then enter "Not Applicable")
13. Contract Required Dates must be set to post an addendum. The required contract dates for the program can be determined by the Contract Dates Folder on the Support Tab. The Contract Required Field will have the value of Yes for all required Date Types. The program is installed with the following default required Contract Dates:
    a. Bid Deadline
    b. Bid Examine
    c. Bid-Opening
    d. Final Completion
    e. Pre-Bid
    f. Proposal Read
14. All Locations/Stations must have an improvement type/FAP to post an addendum. In the case of a location not having the required funding information, if the location does have corresponding stations with their required funding information, the requirement has been met.
15. All Improvement types must have a corresponding FAP Number to post an addendum.
16. All Locations/Stations must have a quantity value other then zero (0) to post an addendum. A negative quantity is fine.
17. All Items must have a quantity value greater then zero (0) to post an addendum.
18. All Items must have an Engineer's Estimate Price greater then zero (0) to post an addendum.
19. DOQ Report does not have to be viewed in order to complete the posting an addendum process, but is suggested.
20. The user must confirm that they are ready to advertise the project by clicking Yes on the final prompt verifying that the addendum is ready to post for the project.
21. Addendum 1 can only be set after the Project has been advertised.
22. If the Project is in Addendum 1 or greater, a new addendum cannot be set until the current Addendum has been posted.
23. After a Project has been advertised or an Addendum has been posted, and the user tries to make a change, a message box needs to be displayed notifying the user

that this action will result in a new addendum. The user will also be advised that all changes made from now on will be tracked.

24. The user can only set an Addendum after a project has been advertised.

25. If a user tries to change the addendum (by pressing the set addendum button on the Addenda screen) with out posting the current addendum, the user will then be prompted that the current addendum must be posted before the Addendum can be changed. The user will be asked if they wish to run the Post Addendum wizard.

26. Scenario: In addendum 2, user added, deleted, and changed items. The user now wishes to undelete an Item. This can be done 2 different ways:
    a. Click on the item in red on the Item Detail Screen and pressing the undelete button
    b. Click on the Add/Remove Items Button and check the item. Press Commit.

27. A user can set and post as many addendums as they want without making any changes to the project.

28. The following changes can trigger the setting of a new addendum if one has not been set as of yet:
    a. Edit/Add/Delete a Project Item
    b. Edit/Add/Delete the Contract Name, Contract Number, Contract Limits or Description
    c. User will receive a prompt if they attempt to do the above changes.

29. All Project changes in an addendum will be charged to the current Addendum.

30. Items are locked when the addendum is posted for a contract.

31. The Job Specific Items Description, Unit of Measure, and Item Code cannot be changed after the project has been advertised. If the user needs to change it, they will have to delete the Job Specific Item and reenter it with the new information.

32. Changes to a contract that are tracked in an addendum:
    a. Dates
    b. Limits
    c. Description
    d. RIC number
    e. DBE

33. Addendum Screen contains categorized changes and will display these categories and changes similar to current Addendum Cover Letter (Please refer to handout for this meeting)

19.1 DOQ Table in Addendums:

Posted: Was in a previous addendum
Non-posted: Added in the current addendum
Sub Item: Location/Station

1. Addendum 0
   a. Items
      i. Add an Item: Add lines to the DOQ table and pull the newly recalculated Sequence Number for the item from PRJITEMS.
      ii. Update an Item: There are only 4 lines for the item description. Change the information for the item. The only information that can be changed for the item is the description, quantity, and Unit of Measure.
      iii. Delete an Item: Remove the Item Lines and any associating Sub item lines from the DOQ table. They are literally deleted. NO deleted flag values set. No regard to line numbers.
   b. SUBITEMS:
      i. Add a Sub Item: Add additional lines without regard to page numbers.
      ii. Update a Sub Item: Delete the old sub item record and reinsert the updated sub item at the bottom of the DOQ table.
      iii. Delete a Sub Item: Remove the sub item lines from the table without regard to the deleted flag value or line number values. The sub item records are literally deleted from the DOQ table.
2. Addendum > 0
   a. Posted Items:
      i. Add a Posted Item: This means that the item was deleted in a previous addendum and is now being re-added to the project.
         1. Change the deleted flag value from -1 to 0
         2. Change the sub items for that item from the previous addendum from -1 to 0.
         3. Put the current addendum value for all 42 lines of the page(s) that contain the re-added item.
         4. Change the page revision value to increase by 1 for all 42 lines of the page(s) containing the re-added item.
      ii. Update a Posted Item: Currently, the only thing that can be change for a posted item is the quantity value.
         1. Change the Page Revision value to increase by 1 for all 42 lines of the page that the value was updated on.
         2. Update the Addendum Value to the current addendum value for all 42 lines of the page that the value was updated on.
      iii. Delete a Posted Item:
         1. Change the deleted flag value from 0 to -1 for the item and

all corresponding sub items.

2. Remove the Item and all corresponding sub item descriptions and replace with "Item Deleted"

3. Set the quantity value for the item and all corresponding sub items to nothing

4. Set the Unit of Measure value for the item to nothing

5. Set the Improvement type value for the item and all corresponding sub items to nothing (If the item has sub items, its improvement type value is already set to nothing).

6. The item code, sequence number, ID1, ID2, ID3 values stay the same.

b. Non-Posted Items:

 i. Add a Non-Posted Item:

1. The non-posted item will be inserted at the bottom of the DOQ table and sorted by non-posted item codes. For example:
Currently there are non-posted items
201.5504
201.5506
401.5203
701.9980
If user was to add item 301.2568, it would be placed between 201.5506 and 401.5203

2. The Page Number and Line Number values would be recalculated for the new item and all non-posted items below.

3. Page Revision is only increased by 1 if the non-posted item being added is being added to a page with posted items.

4. Addendum value set to current addendum number regardless if the non-posted item is being added to a page with posted items.

 ii. Update a non-posted item:

1. If the previous page revision value (PageRevOld) is greater then 0, increase the page revision to equal PageRevOld + 1

2. If the previous page revision value (PageRevOld) is equal to 0, the set the page revision value = 0

 iii. Delete a non-posted item:

1. Remove the item and all corresponding sub items from the table.

2. Recalculate the line number and page number value for the non-posted items.

3. If the previous page revision (PageRevOld) value is greater then 0 **and** the addendum value is equal to the current addendum value **and** the item was the only non-posted item on the page:

 a. Decrease the page revision value by 1

b. Recalculate the page number for the current page and all following pages (the following pages consist of only non-posted items).

c. Recalculate the line number for the current page and all following pages (the following pages consist of only non-posted items).

d. Update the non-posted item sequence numbers based off the PRJITEMS table where Wayne calculates the correct sequence numbers.

4. If the previous page revision value is greater then 0 **and** the addendum value is equal to the current addendum value **and** the item is **not** the only non-posted item on the page:

a. Leave the page revision value alone

b. Recalculate the page number for the current page and all following pages (the following pages consist of only non-posted items).

c. Recalculate the line number for the current page and all following pages (the following pages consist of only non-posted items).

d. Update the sequence number for each non-posted item. This information is pulled from PRJITEMS where Wayne calculates the correct sequence numbers.

5. If the previous page revision value is equal to 0 and the addendum value is equal to the current addendum value:

a. Recalculate the page number for the current page and all following pages (the following pages consist of only non-posted items).

b. Recalculate the line number for the current page and all following pages (the following pages consist of only non-posted items).

c. Update the sequence number for each non-posted item. This information is pulled from PRJITEMS where Wayne calculates the correct sequence numbers.

c. 02.04.23 Meeting with Sergei: SUB ITEMS for POSTED ITEMS:

i. Add a Sub Item to a Posted Item:

1. Check for available lines on the item's page.

2. If lines still needed, check for available lines on the letter pages if exist. (I.E. Item is on page 1 and there are pages 1a, 1b, and 1c. First look for available lines on page 1. Then look for available lines on 1a, 1b, and 1c.)
   **Sergei actually pulls all information on the page and letter pages at the same time.

3. If lines still needed, add sub item to item and from that line on move lines down just for that page and its letter pages.

(I.E. Same example as 1b. Inserted sub item is placed in middle of page 1a, from that line to last line on 1c, move lines down without affecting page 2.)

4. If there are no letter pages for the item's page insert the sub item and from that line to the last line of that page move down and on to a new letter page. The new letter page will have revision value = 0 and the addendum value equal to the current addendum value. (I.E. Item A is located on Page 1. Sub item (takes 2 lines) is inserted on to Page 1 for Item A. The last 2 lines of the page will now be moved to Page 1a.)

ii. Update a Sub Item for a Posted Item:

1. On a regular page: If the sub item's description is reduced, move the item total line up the number of lines reduced for the sub item's description and add that number of lines empty between the item's total and the next item's first line.

2. On a letter page: Everything is moved up that number of lines without affecting the next regular page. (I.E. reduced a station's description on Page 1a from 4 lines to 2 lines. Everything on the page will be moved up 2 lines. If there was a page 1b, those lines would also be moved up 2 lines so that the first 2 lines of page 1b would be placed at the bottom of page 1a. Page 2 would not be affected by these changes.)

3. When adding lines to a sub item's description, the same rules as adding a sub item to a posted item are followed.

iii. Delete a Sub Item for a Posted Item:

1. Make the Sub Item Deleted Flag Value = 1
2. Make the Sub Item Quantity Value Empty
3. Make the Sub Item Description Value Empty
4. Make the Sub Item Improvement type Value Empty if not already empty (If a location has stations, the improvement type value is empty for the location)
5. On a regular page: Move all lines up for the deleted sub item number of lines and add that many line empty at the bottom of the page. (I.E. On page 1. if station took 3 lines, remove the station from the page and starting from the deleted station's location to the bottom of the page, move everything up 3 lines. There will now be an added 3 empty lines at the bottom of the page. Page 2 would not be affected.)
6. On a current letter page or if next page is letter page: Move all lines up for the deleted sub item number of lines and add that number of empty lines to the bottom of the last letter page. (I.E. Pages 1, 1a, 1b, 1c, & 1d for Item A. Delete a

station with 4 lines on page 1b for Item A. Starting with the first line of the deleted station move everything below it through page 1d up 4 lines. Add 4 empty lines to the bottom of page 1d.)

7. If changes were made to a regular page and the regular page had letter pages before it, do not use them for the regular page's changes. (I.E. Pages are 1, 1a, 1b, & 2. Changes made to page 2. Do not use available lines on 1, 1a, & 1b.)

d. Sub Items for Non-Posted Items:

  i. <u>Add a Sub Item to a Non-Posted Item:</u>

1. Insert the Sub Item Record at the bottom of the non-posted Items recordset (Sergei creates a recordset of the non-posted items and their corresponding sub-items sorted by item code, LDESC, SDESC, and ITEMLINENO).
2. Recalculate the page number and line number for the recordset.
3. If the sub item is being added to a non-posted item that exists on a page with posted items, increase the page revision value + 1 for all 42 lines of that page.
4. If the sub item is being added to a non-posted item that exists on a page with posted items, set the addendum value equal to the current addendum for all 42 lines of that page.
5. If the sub item is being added to a non-posted item that exists on a page without any posted items, leave the page revision value alone.
6. If the sub item is being added to a non-posted item that exists on a page without any posted items set the addendum number equal to the current addendum value.

  ii. <u>Update a sub-item for a non-posted item:</u> Determine the current number of lines for the sub item's description.

1. If the number is equal to the number of the updated sub item lines
   a. Update the information in those lines.
   b. Recalculate the Line Number and Page Number starting at the item and all following pages.
2. If the number is different from the number of the updated sub item lines
   a. Delete the sub item
   b. Insert the updated sub item at the bottom.
   c. Recalculate the page number and line number values starting at the non-posted item and all following pages.
3. If the non-posted item is part of a page containing posted items, increase the page revision value + 1.

  iii. <u>Delete a sub-item for a non-posted item:</u>

1. Delete the sub item rows.
2. Recalculate the line number values for the item and all following pages.
3. Recalculate the page number values for the item and all following pages.
4. If the non-posted item that the sub-item was deleted from exists on a page containing posted items, then increase the page revision value + 1.

3. When the user Posts the addendum nothing happens to the DOQ table.
4. If an item is re-added in addendum 0, the previous information (locations, stations, etc.) for that item will not be re-added.

20. Support

1. General Overview:
   a. Quest Professional displays the support folders:
      i. Assembly Templates
      ii. Contract Dates
      iii. Design Stages
      iv. Factors
      v. Funding Sources
      vi. UM
      vii. Utilities
      viii. Datasets
   b. Quest Professional will only have Add and Edit buttons for each of these folders
   c. Changes made in the Support Tab do NOT cascade through currently existing projects.
2. Assembly Templates
   a. Purpose: This provides an easier way to create assemblies for the user. The user creates the assembly name and unit of measure and adds items to the assembly template. This template can then be used to create a new assembly in a project.
   b. Can only add items from the Items List in the support folder to an assembly template.
   c. Job Specific and Locations/Stations cannot be added to an assembly template.
3. Award Categories
   a. Contains award category descriptions.
4. Bidder Certification Documents
   a. The only value that can be changed in Bidder Certification Documents is the Required for Contract checkbox.
5. Contract Dates
   a. The deleting and changing of fields in the Contract Dates Folder can adversely affect the future contracts. The Yes in the DateRequired Field makes the date required for future contracts in order to advertise or post an addendum.
   b. Screen displays:
      i. Date Type
      ii. Description
      iii. Contract Required: Yes/No value
6. Cities
7. Datasets
   a. Default WAUP1999
      i. To be import, the file must be a .xml
      ii. It is highly suggested to import files from the specified web location. Deborah will ask Joe for the website.
      iii. Set default data means this is the default dataset included with all

        future projects created.

      iv. There must be at least one existing dataset

      v. Wayne could not find a purpose for the Save button and will check with David if it is okay to remove this.

      vi. If a dataset is removed from here, it will not affect currently existing projects as the dataset price is saved to the prjItems Table.

8. Design Stages

9. Factors

10. Funding Sources

    a. ECOnly field means that E&C% for that improvement type must be 0

11. Funding Sub-Sources

    a. Funding sub-source is not used currently.

12. Items

    a. Job Specific Items are not included.

    b. Can specify item is a sign or regular.

13. Improvement types

14. Project Types

15. Sites

    a. The following characters are allowed in the Site Name:

      i. Alphabet (A-Z)

      ii. Numbers (0-9)

      iii. Comma (,)

      iv. Period (.)

      v. <space>

      vi. Dash (-)

      vii. Open Parentheses (

      viii. Closed Parentheses)

      ix. Ampersand (&)

16. UM

    a. here will only affect Job Specific Items, Support Tab Items, and Assemblies.

17. Utilities

21. Datasets

1. Datasets must be in a .xml format
2. Currently the only datasets that can be imported are from the PTS website:
   http://www.plexuscorp.com/ridot/p_eng/pgs/Datasets.asp
      a. It is highly suggested to only import files from the website.
3. Deleted datasets are not exported when exporting Support Data.
4. Support Tab Datasets:
      a. Set default data means this is the default dataset included with all future projects created.
      b. The project must contain at least one existing dataset.
      c. If a dataset is removed from the support tab, it will not affect currently existing projects as the dataset prices are saved to the prjItems Table.
5. Project Datasets:
      a. Project can only contain datasets that are located in the Support Tab (REFDATASETS in the Support Database).
      b. Datasets are applied in priority to a specific project by using the arrow buttons.
      c. If the priority of datasets in a project is changed, the updated prices cascade through the project.
      d. The datasets with the highest priority is used to set the item's default price.
      e. All datasets applied to a project will be reviewed in the specified priority for each item until a price greater then 0 is found (if one exists).

22. Project Team

1. A project can have multiple team members.
2. Team permissions are site-specific.
3. There can only be one Owner of a project.
4. The Inclusions tab is a list of the items that the member is allowed to read/write.
5. The Exclusions tab is a list of the items that the member is not allowed to read/write.
6. Lock Permission means that the user can neither read/write
7. When a contract has been advertised or an addendum has been posted, all permissions are now set to read only and locked from writing.
8. Owner is the only role with significance to Quest. The Owner is the person with admin rights to the project. The other roles are for personal use to organize.
9. When an item is locked, there is a lock item to the left of the item and its corresponding sub-items.
10. When an item is locked, it means that the item is completed and read for advertising or posting.
11. There must be an owner for each project.
12. Each time a team member is added, the member role is defaulted to Member.
13. When a project is advertised or an addendum is posted, the permissions for each member including the owner become the following:
    a. Include all items as Read
    b. Include all items as Locked.
    c. Exclude all items as Write.
14. Exclusions overwrite inclusions.
15. The Quest Administrator or a user that has Admin rights will take on the project's owner permissions.

23. DOQ To Excel

1. The code pulls the following item information in the specified order and makes a "dump" into an Excel spreadsheet:
   a. PTS CODE
   b. PROJECT NAME
   c. SEQ NO
   d. ITEM CODE
   e. ITEM DESCRIPTION
   f. LOCATION DESCRIPTION
   g. STATION DESCRIPTION
   h. LOCATION QUANTITY
   i. STATION QUANTITY
   j. LOCATION IMPROVEMENT TYPE
   k. STATION IMPROVEMENT TYPE
2. The information displayed on the Excel spreadsheet is based at the location/station level. The item will show if there are no location/stations for that item.
   a. If the item does not have any locations or stations, the Quantity value on the Excel spreadsheet will be zero (0).
   b. The item's default improvement type will not display on the Excel Spreadsheet.
3. This functionality will work with:
   a. Excel version 8.0 (Office 97)
   b. Excel version 9.0 (Office 2000).
   c. 1-2-3 in Lotus SmartSuite Millennium Edition.
   d. StarOffice 5.2 (from Sun).
4. The user must click on the project name in the tree view to the left of the application before selecting DOQ to Excel.
5. To select this functionality the user must select in the menu Tools then Data Exchange then DOQ to Excel.
6. The user can also use the shortcut key: Ctrl + 0 to select this functionality.
7. The user will be prompted as to what file path the user wants the file to be saved in.
8. When the user types in the file path, they need to make sure they type a "\" at the end of the path. I.E. "C:\Quest\" will be the file path for the .xls file to be saved to.
9. The name of the file will always be DOQ2XL.xls.
10. After the user selects the path and presses the OK button, the user will then receive a message box stating that the file was successfully saved to the user – specified path (the path name is listed here).

24. Admin

1. The only editable area is the groups and users section of the Admin module.
2. Multiple groups can be created in the Admin Module.
3. Multiple users can be created in the Admin Module.
4. A user can only be assigned to 1 group.
5. A user must be assigned to a group.
6. A user can be assigned permissions to the following modules:
    a. Admin
    b. Contracts
    c. Data Transfer
    d. Engineers Estimate
    e. Projects
    f. Reports
    g. Support Data
7. The Admin Module defaults with the following groups and their permissions:
    a. Administrator (rights to all modules)
    b. Data Entry (rights to all modules except Engineer's Estimate)
    c. Project Engineer (Projects and Reports)
    d. Project Manager (Contracts, Data Transfer, Projects, and Reports)
8. Permissions for groups can be modified anytime.
9. Changes to the Admin Module will not require the posting of an addendum.
10. The user that has the System Administrator's Name should not be deleted from the user node of the Admin Module.
11. The administrator name is to log on to the system by the Administrator. This name and its password also exists in the user section of the Admin Module. If it is edited or deleted in the user section, it will also be edited and deleted here and vice versa.
12. The Reports Folder Path defines where all reports for Quest are placed. If the user was to change this path, all report files must be moved by the user to this new path. It is highly suggested that the user does not edit the report file path.
13. Schema:
    a. Separate – there are a few databases for different functionalities. I.E. Support DB is for the Reference Data, Import DB is for importing/exporting, etc.
    b. Common – There is only 1 database for all functionalities. This currently does not work and will be used in the future.
14. Location specifies the location of the database. If the user changes this location, they must be sure to physically move the database to the updated location. It is highly recommended that the user not change this information.
15. All 3 databases must be kept in the same folder.
16. DSN- This contains the Setting for the below databases
    a. Active Database: If user changes this, they must also change it in the DSN settings for the Program. It is highly recommended that this information not be changed.
    b. Import Database: If user changes this, they must also change it in the

DSN settings for the Program.   It is highly recommended that this information not be changed.

   c. There is no Support Database here because the DSN path to the Support Database is hard coded in the program.

17. Data Transfer
   a. Incoming Path – This is the location of the folder that will contain the files from a .zip file that is being imported.
   b. Host Name – this is for future use on the internet
   c. Outgoing Path – This is the location of the folder that will contain the files that are to be zipped when exporting a file
   d. Port Number– this is for future use on the internet
   e. Temporary Path – This is used for importing and exporting files
   f. User Name– this is for future use on the internet
   g. User Password– this is for future use on the internet

18. Users and Groups
   a. Groups
      i. Groups can be deleted, added, and edited.
      ii. When adding a group, the Group Name is the only field required. The modules permissions do not have to be set.
      iii. Below are the default groups and their default permissions:
         1. Administrator (rights to all modules)
         2. Data Entry (rights to all modules except Engineer's Estimate)
         3. Project Engineer (Projects and Reports)
         4. Project Manager (Contracts, Data Transfer, Projects, and Reports)
      iv. When editing the module permissions for a group, the updated permissions do not cascade to currently added users.
      v. The Admin Group can not be deleted.
   b. Users
      i. There is a default admin user.   The name is "admin" and the password is "admin".   This user matches the System Administrator.
      ii. When adding a user, the required fields are:
         1. Logon Name
         2. Password
         3. Group
         4. User Name (must be selected from the drop down box provided. The data was pulled from the REFUSERS Table in the Support Database.)

19. When the user does not have permission to a module the following happens:
   a. Admin Module: Menu item is invisible
   b. Contract Module: User can view contract information, but cannot edit.
   c. Data Transfer Module: This menu item is invisible.

d. Engineers Estimate Module: User can view, but cannot edit any information on the Item Grid, Sub Items grid, and Funding Sources Grid. User cannot use any of the buttons on these screens.
    i. Assemblies can also only be viewed by user if they do not have permission to the Engineer's Estimate Module.
e. Projects Module: User can view, but cannot edit the project information.
f. Reports Module: The menu item is invisible.
g. Support Data Module: The tab is invisible.

25. Reports

General Overview:

    a. Unless otherwise noted, below the Reports Title on each Report, there should be the Project Number, Contract Number(s) if exists, and FAP Number(s) if exists.

    b. RIDOT will set min requirements for the page margins for a user's printer.

1. Engineer's Estimate
   a. By Improvement type
      i. Each Improvement type and its corresponding items is displayed on a separate page.
      ii. Display:
         1. Improvement type
         2. Improvement type's Description
         3. Percentage Breakdown for the Improvement type
         4. Item's Sequence Number
         5. Item Code
         6. Item's Description
         7. Item's Unit of Measure
         8. Item's Quantity for that Improvement type
         9. Item's Unit Price (Engineer's Estimate Price)
         10. Items Total
         11. Item's E&C Total
         12. Improvement type's Sub-Total
         13. Improvement type's E%C Total
         14. Improvement type's Grand Total
      iii. The item's E&C total is determined at the location/station level.
         1. For each location/station that contains the specified Improvement type, multiply the location/station's quantity by the item unit price.
         2. Multiply the above total by the E&C % value of the Improvement type/FAP combination that is assigned to that location/station.
      iv. The Improvement type's E&C Total is the sum of each item's E&C Total
      v. The Improvement type's Total is the sum of the Improvement type's Sub Total plus the Improvement type's E&C Total
      vi. If the improvement type is CENG the E&C Total Column will hold zeroes. The total row for the CENG Improvement type will be the same as the CENG Sub Total.
   b. By FAP
      i. Display:
         1. FAP Number
         2. Item's Sequence Number
         3. Item Code
         4. Item's Description
         5. Item's Unit of Measure

6. Item's Quantity for that Improvement type
7. Item's Unit Price (Engineer's Estimate Price)
8. Items Total
9. Item's E&C Total
10. FAP Sub-Total
11. FAP E&C Total
12. FAP Grand Total

ii. Items are grouped by the FAP Number.
iii. If an item has a location or station with this FAP Number, the item will be displayed under the FAP Number.
iv. The item's total quantity value is determined at the location/station level
   1. Sum of the item's locations and stations with the FAP Number.
v. The item's total is the quantity appropriated to the FAP Number multiplied by the item's unit price.
vi. The Sub-Total is equal to the sum of the item totals.
vii. The item's E&C total is determined at the location/station level.
   1. For each location/station that contains the specified FAP Number, multiply the location/station's quantity by the item unit price.
   2. Multiply the above total by the E&C % value of the Improvement type/FAP combination that is assigned to that location/station.
viii. The E&C Total for the FAP Number is the sum of the item's E&C Total Values.
ix. The FAP Number total is the sum of the Sub-Total plus the E&C Total.

c. By Item Sequence
   i. Display:
      1. Item's Sequence Number
      2. Item Code
      3. Item's Description
      4. Item's Quantity
      5. Item's Unit Price (Engineer's Estimate Price)
      6. Item's Total
      7. Item's E&C Total
      8. Sub-Total(Excluding CENG and E&C)
      9. CENG Total
      10. E&C Total (Less CENG)
      11. Grand Total
   ii. All Items are displayed without grouping
   iii. Items are placed in order by sequence number
   iv. Each item total is equal to the Item's quantity multiplied by the Item's Unit Price.

  v. Sub Total is equal to the sum of all item totals except the CENG items

  vi. CENG Total: will be the sum of all CENG item totals

  vii. E&C Total(less CENG): Subtraction of the CENG Total from the E&C Total value

  viii. Grand Total: Sum of E&C Total(less CENG) + Sub Total(excludes the CENG and E&C)+ CENG

  ix. The CENG category is displayed at the bottom regardless if there is a CENG improvement type in the project.

  x. Item's Quantity and Total Amount are determined at the Item Level.

  xi. Item's E&C Amount are determined at the Location\Station Level where the locations\stations are assigned funding.

2. Item List

  a. Display:

    i. Item's Sequence Number

    ii. Item Code

    iii. Item's Description

    iv. Item's Quantity

    v. Item's Unit of Measure

  b. The items are ordered by the sequence number

3. Funding Summary

  a. By FAP

    i. Information is determined at the Location/Station Level for the locations\stations that are assigned funding sources.

    ii. Displayed:

      1. Each FAP Number

      2. Improvement type for the FAP Number

      3. Improvement type's Description

      4. FHWA (Federal) Percentage for the Improvement type and FAP Number combination.

      5. State Percentage for the Improvement type and FAP Number combination.

      6. Other Percentage for the Improvement type and FAP Number combination.

      7. Construction Total applied to the Improvement type and FAP Number combination.

      8. Federal Funds without E&C (Construction Total multiplied by the FHWA Percentage)

      9. State Funds without E&C (Construction Total multiplied by the State Percentage)

      10. Other Funds without E&C (Construction Total multiplied by the Other Percentage)

      11. E&C Percentage Value for the Improvement type and FAP Number combination.

12. E&C Total for the Improvement type and FAP Number combination
13. Improvement type and FAP Number combination's Total including E&C.

   iii. The CENG category is displayed at the bottom regardless if there is a CENG improvement type in the project.

b. By Improvement type

   i. Information is determined at the Location/Station Level for the locations\stations that are assigned funding sources.

   ii. Display:
1. Improvement type
2. Improvement type's Description
3. FHWA (Federal) Percentage for the Improvement type
4. State Percentage for the Improvement type
5. Other Percentage for the Improvement type
6. Construction Total applied to the Improvement type
7. Federal Funds without E&C (Construction Total multiplied by the FHWA Percentage)
8. State Funds without E&C (Construction Total multiplied by the State Percentage)
9. Other Funds without E&C (Construction Total multiplied by the Other Percentage)
10. E&C Percentage Value for the Improvement type
11. E&C Total for the Improvement type
12. Improvement type Total including E&C.
13. Total E&C for all Improvement types
14. Total CENG
15. Remaining E&C less CENG

   iii. If an Improvement type is in more then one Improvement type and FAP Number combination, the Improvement type and its information will be listed for each combination.

   iv. The CENG Improvement type is not included in the list of improvement types, but instead is listed at the bottom.

   v. If the CENG Improvement type is used in the project, all FAP Numbers that it is combined with are listed to the right of the CENG Improvement type.

   vi. The CENG category is displayed at the bottom regardless if there is a CENG improvement type in the project.

4. Specialty Items
a. Display
   i. Item's Sequence Number
   ii. Item Code
   iii. Item's Description
   iv. Item's Unit of Measure
   v. Item's Quantity
   vi. Item's Unit Price

        vii.   Item's Total (Quantity * Unit Price)
       viii.   Specialty Item Total
        ix.   Grand Total (Total of all items regardless if they are specialty)
         x.   Specialty Item % of Total

   b. Items are listed in order by the item's sequence number
   c. Only Specialty Items are displayed

5. Potential DBE
   a. Display
         i.   Item's Sequence Number
        ii.   Item Code
       iii.   Item's Description
       iv.   Item's Unit of Measure
        v.   Item's Quantity
       vi.   Item's Unit Price
       vii.   Item's Total (Quantity * Unit Price)
       viii.   Potential DBE Item Total
        ix.   Grand Total (Sum of all item totals regardless of DBE value)
         x.   DBE Item % of Total
   b. Only display Items with a DBE value

6. Job Specific Items
   a. With Potential DBE
         i.   Display:
            1.   Item's Sequence Number
            2.   Item Code
            3.   Item's Description
            4.   Item's Unit of Measure
            5.   Item's Unit Price (Engineer's Estimate)
            6.   Item's Total (Unit Price * Quantity)
            7.   Total Job Specific and Potential DBE Items (Sum of Item Totals)
            8.   Grand Total - 01.08.14 Quest Reports Meeting: Total of all items in the contract regardless if it's job specific or DBE
            9.   Job Specific and Potential DBE Item % of Grand Total
        ii.   Only show items that are Job Specific and DBE
   b. Job Specific Items
         i.   Display
             1.   Item's Sequence Number
            2.   Item Code
            3.   Item's Description
            4.   Item's Unit of Measure
            5.   Item's Quantity
            6.   Item's Unit Price
            7.   Item's Total(Quantity * Unit Price)
            8.   Total Job Specific Items

9. Grand Total - 01.08.14 Quest Reports Meeting: Grand Total = Total of all items in the contract regardless if it's job specific or DBE
10. Job Specific Item % of Grand Total
   c. Only displays the Job Specific Items
7. Bid Opening Summary
   a. Display
      i. Bidder Name
      ii. Total Bid Price
      iii. Total Number of Items
      iv. Total Number of Bidders
   b. Bidders Listed from lowest bid to highest bid.
   c. Lowest Bidder and price in Bold.
8. Bidder's Comparison Summary
   a. Display
      i. Engineer's Estimate for Contract
      ii. Bidder Name
      iii. Bidder total for Contract
      iv. Difference between Bidder Total and Engineer's Estimate
      v. Percent Difference between Bidder Total and Engineer's Estimate
      vi. Total Number of Items
      vii. Total number of Bidders
   b. Sort low to high (lowest at the top and in bold)
   c. Lowest Bidder and information in bold.
9. Bidder's Extension Check
   a. Display
      i. Bidder Name
      ii. Item's Sequence Number
      iii. Item Code
      iv. Item's Description
      v. Item's Quantity
      vi. Item's Unit Price (determined by the lowest bidder)
      vii. Item's Correct Total (What the computer determines as the correct item total)
      viii. Item's Bidder Total (What the bidder placed on the Proposal Items Report as the item total)
      ix. Total number of items
      x. Total number of differences between correct total and bidder total
10. Summary of Bidder's Total
   a. Display
      i. Bidder's Short Name
      ii. Bidder's Full Name
      iii. Bidder's Correct Total(Computed Total of quantity * Bidder's Unit Price)
      iv. Bidder's Reported Total (Final Total on Proposal Items Report)

       v. Bidder's Extension Total (Computed sum of all bidder's reported extension)

      vi. Error (Placed here if the three totals do not match)

     vii. Total number of items

    viii. Total number of bidders

b. Bidder's with the reported total not matching the correct total are in bold

c. Correct Total: determined by the computer

d. Bidder Reported Total: What the user computed as the final total (the wrong amount)

e. Bidder Extension Total: Sum of all the user's amounts

11. Bidder's Comparison Detail

a. Display

       i. Item's Sequence Number

      ii. Item Code

     iii. Item's Description

     iv. Item's Quantity

      v. Item's Unit of Measure

      vi. Bidder Short Name

     vii. Bidder Unit Price for the item

    viii. Bidder Total Price for the item

     ix. Bidder total for unit price

      x. Bidder total for all items

b. Bold the lowest bidder column

c. Low bid to high bid (Across the report) (Left to Right)

d. Items are sorted by Sequence Number

12. Low Bid analysis – By Item

a. Comparison of lowest bidder to engineer's estimate

b. Make sure that the negative % values are never more then -100%

d. Sorted by Sequence Number

c. By Dollar Difference

e. Sort by positive down to negative

d. By Percentage Difference

f. Sort by positive down to negative

13. DOQ

a. Location Quantity does not display if the location has stations

b. Location's Improvement type does not display if the location has stations

c. Each Item's Total Quantity is displayed and underlined with the Item Code after the item information and locations/stations are displayed.

d. If an item continues to the next page the item's sequence number and item code are displayed on the next page with the text "continued"

14. DOQ Table of Contents

a. Display

       i. Item Code

      ii. Item Description

     iii. Page Number Item begins on

15. Proposal Items

    a. Item description is 255 characters
    b. Should contain the Project Name, Contract Number, and the FAP Numbers listed on each page.
    c. On the Special Notice proposal Page, all bid prices will be followed with the word "is" and then the written out wording of the price.
    d. The Proposal Items Report should be the section from Proposal Page to the end of the current Bidder Certification Documents (I.E. First page should just have the work Proposal on it & the last page should have one signature by the bidder.
    e. If the user adds a new item in Addendum 3 and this item causes a new page to be created and the user then changes the qty, improvement type, or FAP value, the revision value for the new page becomes revision 1.
    f. Each page of the Proposal Items Report will contain 7 items.
    g. The list of Proposal Items will display:
        i. Item's Sequence Number
        ii. Item Code
        iii. Item's Quantity
        iv. Item's Description
        v. Items Unit of Measure
        vi. Items Unit Bid Price
        vii. Item's Amount (Price multiplied by quantity)
        viii. Final Total of Bid.

16. Assembly Summary
    a. Make it look like the DOQ Report, portrait style
    b. Don't show improvement types (because there could be multiples)

17. Assembly Detail
    a. Information is pulled from the DOQ information
    b. Portrait style
    c. Should look exactly like the DOQ report, except it should have a header

18. Low Bid Analysis
    a. Information is determined at the Location/Station Level for the locations\stations that are assigned funding sources.
    b. By Percentage (%) Difference
        i. Display:
          1. Item's Sequence Number
          2. Item Code
          3. Item's Description
          4. Item's Unit of Measure
          5. Item's Quantity
          6. Engineer's Unit Price for the item
          7. Engineers Estimated Price (Quantity * Engineer's Unit Price)
          8. Lowest Bidder's Unit Price for the item
          9. Lowest Bidder's Estimated Price (Quantity *Bidder's Unit Price)

          10. Difference (Bidder's Unit Price – Engineer's Unit Price) & (Bidder's Estimated Price – Engineer's Estimated Price)

          11. Percent Difference between the Engineer's and Bidder's Estimated Price.

          12. Engineer's Total for Estimated Price

          13. Bidder's Total for Estimated Price

     ii. Items are listed from the highest percent difference to the lowest percent difference.

  c. By Dollar Difference

     i. Display:

          1. Item's Sequence Number

          2. Item Code

          3. Item's Description

          4. Item's Unit of Measure

          5. Item's Quantity

          6. Engineer's Unit Price for the Item

          7. Engineer's Estimated Price for the Item (Item's Quantity * Engineer's Unit Price)

          8. Lowest Bidder's Unit Price for the Item

          9. Lowest Bidder's Estimated Price for the Item (Item's Quantity * Bidder's Unit Price)

          10. Unit Price Difference (Bidder's Unit Price – Engineer's Unit Price)

          11. Estimated Price Difference (Bidder's Estimate Price – Engineer's Estimated Price)

          12. Percent Difference between the Engineer's Price and Bidder's Price

          13. Engineer's Total for Estimated Price

          14. Bidder's Total for Estimated Price

     ii. Items are ordered from the highest dollar difference to the lowest dollar difference.

  d. By Item

     i. Display:

          1. Item's Sequence Number

          2. Item Code

          3. Item's Description

          4. Item's Unit of Measure

          5. Item's Quantity

          6. Engineer's Unit Price for the Item

          7. Engineer's Estimated Price for the Item (Item's Quantity * Engineer's Unit Price)

          8. Lowest Bidder's Unit Price for the Item

          9. Lowest Bidder's Estimated Price for the Item (Item's Quantity * Bidder's Unit Price)

          10. Unit Price Difference (Bidder's Unit Price – Engineer's Unit Price)

11. Estimated Price Difference (Bidder's Estimate Price – Engineer's Estimated Price)
12. Percent Difference between the Engineer's Price and Bidder's Price
13. Engineer's Total for Estimated Price
14. Bidder's Total for Estimated Price

ii. Items are listed by order of the item's sequence number

19. Low Bid Pricing By Funding Source
   a. Information is determined at the Location/Station Level for the locations\stations that are assigned funding sources.
   b. By Improvement type
      i. Display:
         1. Improvement type
         2. Improvement type's Description
         3. Improvement type's Percentage Breakout
         4. Item's Sequence Number
         5. Item Code
         6. Item's Description
         7. Item's Unit of Measure
         8. Item's Quantity for the Improvement type
         9. Lowest Bidder's Contract Price for the item
         10. Contractor's Sub-Total for the Improvement type excluding E&C
         11. Contractor's E&C Total for the Improvement type (Improvement type's E&C % * Contractor's Sub-Total)
         12. Contractor's total cost for the Improvement type (Contractor's Sub-Total + Contractor's E&C Total)
      ii. Based on the lowest bidder only
      iii. Group by improvement type
      iv. Sort item's for the improvement type by the item's sequence number
      v. The item listed will only display the quantity of the item's locations and stations applied to the specified improvement type.
      vi. If the improvement type is assigned to more then one FAP Number, the Improvement type will be displayed on a separate page for each combination.
      vii. Show the E&C%
   c. By Item
      i. Display
         a. Item's Sequence Number
         b. Item Code
         c. Item's Description
         d. Item's Unit of Measure
         e. Item's Quantity
         f. Lowest Bidder's Contract Price for the item
         g. Lowest Bidder's Contract Amount for the item
         h. Contractor's Sub-Total Excluding CENG and E&C

i. Contractor's CENG Total
j. Contractor's E&C Total
k. Contractor's Total E&C (CENG + E&C)
l. Contractor's Grand Total (Contractor's Sub-Total + Total E&C)
ii. The Item's E&C Total is determined at the Location/Station level by the funding applied to the location/station.
iii. Display the CENG items with other items but exclude from subtotal and show separately below

20. Low Bid Estimate Funding Summary
   a. Information is determined at the Location/Station Level for the locations\stations that are assigned funding sources.
   b. By FAP
      i. Display:
         1. FAP Number
         2. Improvement type
         3. Improvement type's Description
         4. FHWA% (Federal) percentage for the Improvement type and FAP Number combination.
         5. State percentage for the Improvement type and FAP Number combination.
         6. Other percentage for the Improvement type and FAP Number combination.
         7. Construction Total - Lowest Bidder's price for that improvement type under that FAP (before E&C)
         8. Federal Funds
         9. State Funds
         10. Other Funds
         11. E&C % - based on the E&C% for that improvement type
         12. E&C Total - (E&C% * Construction)
         13. Total including E&C (Construction Total + E&C Total)
         14. FAP Construction Sub-Total for all improvement types assigned to the FAP Number excluding CENG
         15. FAP Federal Funds Sub-Total for all improvement types assigned to the FAP Number excluding CENG
         16. FAP State Funds Sub-Total for all improvement types assigned to the FAP Number excluding CENG
         17. FAP Other Funds Sub-Total for all improvement types assigned to the FAP Number excluding CENG
         18. FAP E&C Sub-Total for all improvement types assigned to the FAP Number excluding CENG
         19. FAP Total Including E&C Sub-Total for all improvement types assigned to the FAP Number excluding CENG
         20. Contract Grand Total for Construction
         21. Contract Grand Total for Federal Funds
         22. Contract Grand Total for State Funds
         23. Contract Grand Total for Other Funds

        24. Contract Grand Total for E&C Total
        25. Contract Grand Total for Total Including E&C
        26. E&C Total (E&C Total – CENG), if CENG Improvement type in project, title will be E&C Total (less CENG)
    ii. Report is grouped by FAP Number and then by Improvement type
    iii. If there is a CENG improvement type, display it after the subtotal line
  c. By Improvement type
    ii. Display
        1. Improvement type
        2. Improvement type Description
        3. FHWA (Federal) Percentage for the Improvement type
        4. State Percentage for the Improvement type
        5. Other Percentage for the Improvement type
        6. Lowest Bidder's Construction Total for the Improvement type
        7. Federal Funds for the Improvement type (Federal % * Construction Total)
        8. State Funds for the Improvement type (State % * Construction Total)
        9. Other Funds for the Improvement type (Other % * Construction Total)
        10. E&C percentage for the Improvement type
        11. E&C Total for the Improvement type (E&C % * Construction Total)
        12. Total including E&C for the Improvement type
        13. E&C Total less CENG (E&C Total – CENG Total) if applicable
        14. Contract Grand Construction Total
        15. Contract Grand Federal Total
        16. Contract Grand State Total
        17. Contract Grand Other Total
        18. Contract Grand E&C Total
        19. Contract Grand Total including E&C
    iii. Display each improvement type
    iv. % breakout between federal, state, and other
    v. Display the lowest bidder's total and then break it out based on the percent's for each category
    vi. CENG is included in this list
21. Items with Fractional Quantities
  a. By Summary
    i. Displays items whose locations/stations have fractional quantities.
    ii. Display:
        1. Item's Sequence Number
        2. Item Code
        3. Item's Description
        4. Item's Total Quantity

          iii.   Items are displayed that have a location/station with a fractional quantity
- b. By Detail
  - i. Display:
    1. Item's Sequence Number
    2. Item Code
    3. Item's Description
    4. Location Description
    5. Station Description
    6. Location's Quantity if there are no stations for the location
    7. Station Quantity
    8. Location's FAP Number if there are no stations for the location
    9. Station's FAP Number
    10. Location's Improvement type if there are no stations for the location
    11. Station's Improvement type
  - ii. Displays items whose location/station quantities are fractional
  - iii. If an item has a location/station with a fractional quantity, all locations and stations for that item are displayed.

22. Bidder Certification Documents
  - a. The Bidder Certification Document should be the "A" pages and the contract documents included by the contractor (I.E. Anti-Collusions Statement, DBE, etc.)
  - b. Each field that the user enters should be underlined and bolded in the document printout.
  - c. If DBE is 0 then put in statement that DBE is not required for this project.

23. Advertising Package
  - a. Contains the A Pages, Bidder Certification Documents, and the Proposal Items.

24. Advertising Checklist
  - a. The report will contain the following sections:
    - i. Locations/Stations:
      1. All items don't have any stations, just a location
      2. All items that have location/station description with Project Wide
    - ii. Fractional Quantity Items
    - iii. All Contract fields and if they are filled
    - iv. All sub items must have FAP and Improvement type
    - v. Items without Estimated Prices(Estimated Price Summary)
    - vi. Item, UM, Qty, Estimated Price, Dataset Price, difference between the 2 prices. **Purpose is to ensure that Estimated Prices are not the same or similar to the Dataset price.
    - vii. Suspicious Location/Station Descriptions (I.E. "Project wide")
    - viii. Items with zero values
    - ix. Locations and Stations with zero values.

25. Support
    a. Cities
        i. City
        ii. State
        iii. County
    b. Companies
        i. Name
        ii. Address
        iii. Phone Number
        iv. Fax Number
        v. E-Mail
        vi. Contact
        vii. Bidder Code
        viii. Short Name
        ix. Discipline
    c. Award Categories
        i. Award Categories ID
        ii. Description
    d. Contract Dates
        i. Date Type
        ii. Description
        iii. Required
    e. Datasets
        i. Dataset Name
        ii. Item Code
        iii. Item's Description
        iv. Item's Unit of Measure
        v. Item's Average Weighted Price
    f. Design Stages
        i. Design Stage Code
        ii. Description
    g. Factors
        i. Factor
        ii. Description
    h. Funding Source
        i. Source Type
    i. Funding Sub Source
        i. Source Type
    j. Items
        i. Item Code
        ii. Item's Description
        iii. Item's Unit of Measure
        iv. Items Average Weighted Price
        v. Date
        vi. DBE
        vii. Notes

        viii. Utility
- k. Improvement types
    - i. Improvement type
    - ii. Description
- l. Project Types
    - i. Type
    - ii. Description
- m. Site
    - i. Site Name
    - ii. Company Name
    - iii. Host Name
    - iv. Port Number
    - v. Out Path
    - vi. In Path
    - vii. Temp Path
    - viii. User Name
    - ix. Password
- n. UM
    - i. Unit of Measure Code
    - ii. Description
- o. Users
    - i. Name
    - ii. Short Name
    - iii. Address
    - iv. Phone Number
    - v. Fax Number
    - vi. E-Mail
    - vii. Contact
    - viii. Company Name
    - ix. Department
    - x. Department Short Name
    - xi. OBS Code
- p. Utilities
    - i. Utility Code
    - ii. Description

C. How To…

1. Admin Screen

NOTE: A user must be applied to the program before the user can be applied to the project team and have project team permissions set.

1.1 Add a New User

1. In the toolbar click on Admin. The **Quest Management** window appears.
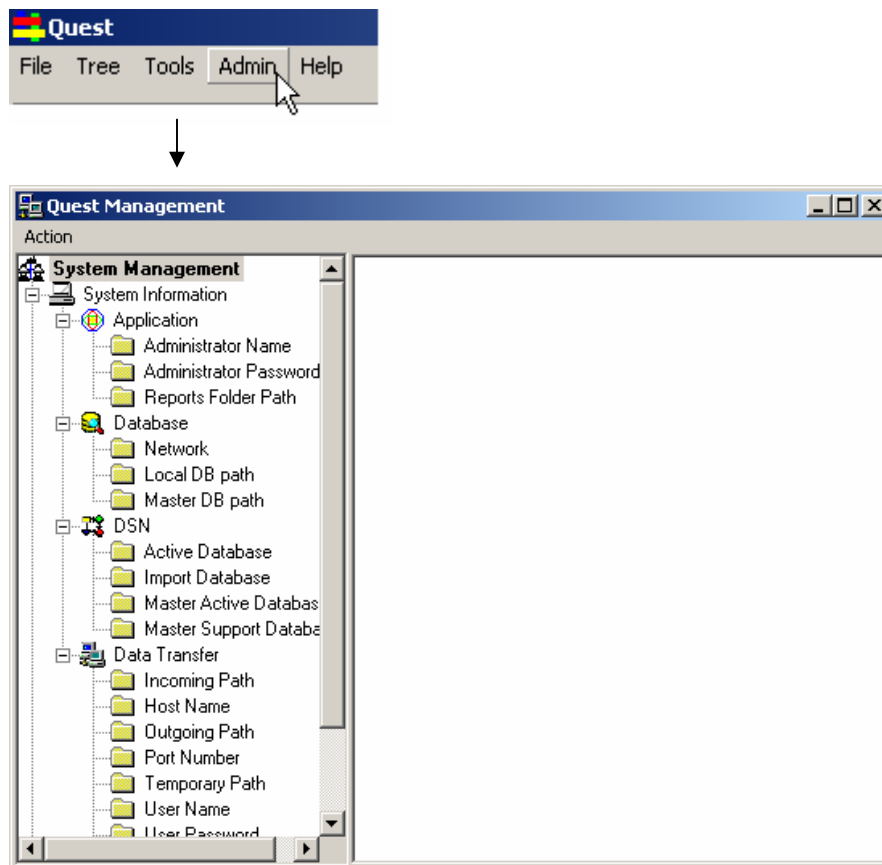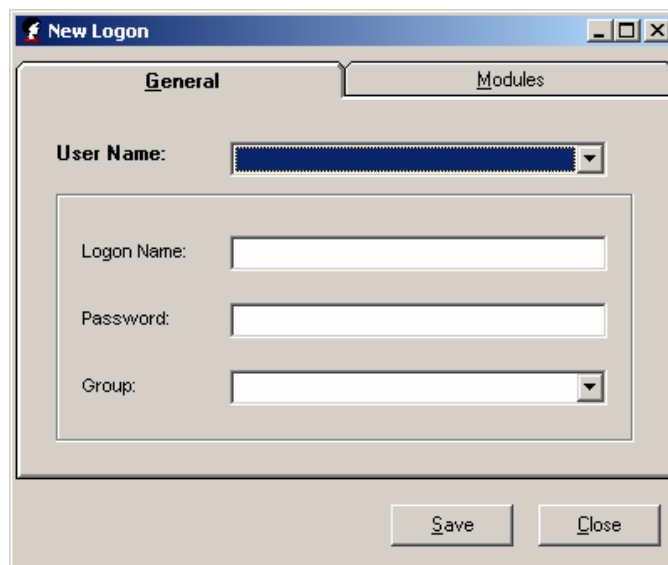
2. Use the scrollbar to locate the User and Group Node in the **System Management** menu.

3. Click on Users. All of the current users for Quest Professional on this machine
    will be listed on the right side of the **Quest Management** window.
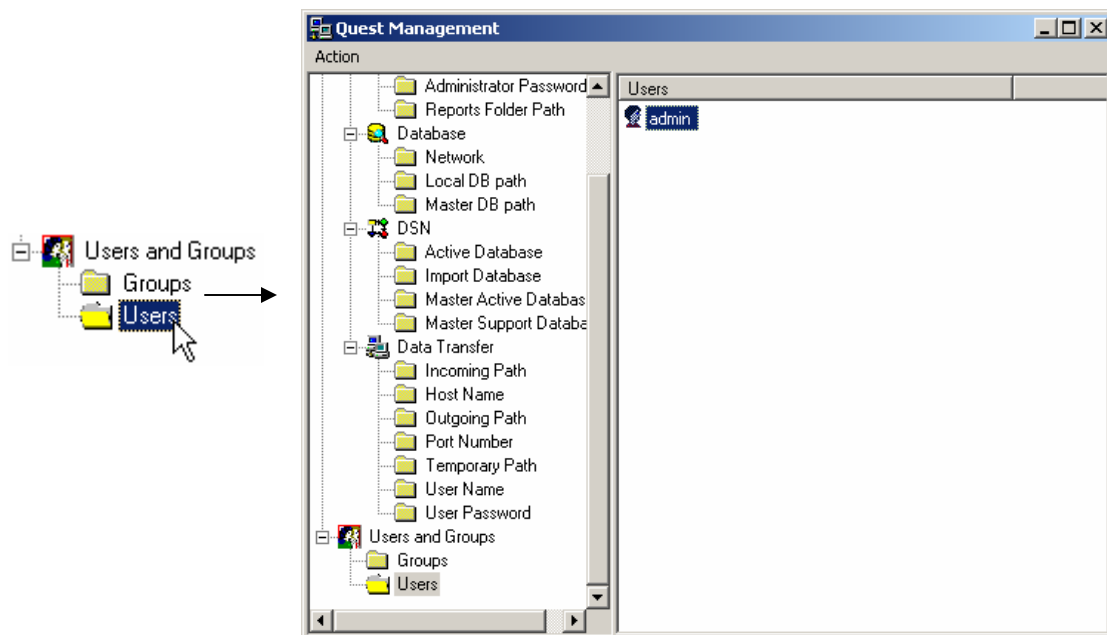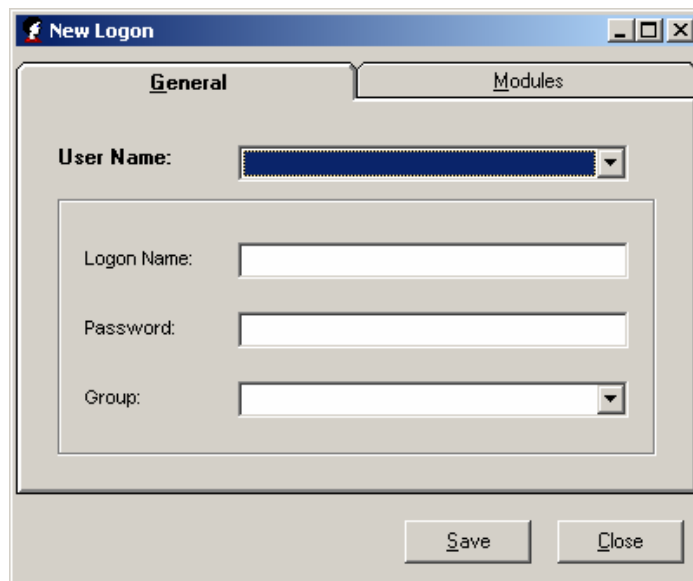
4. Click on Action and then New User in the **Quest Management** toolbar. The **New
    Logon** window appears.
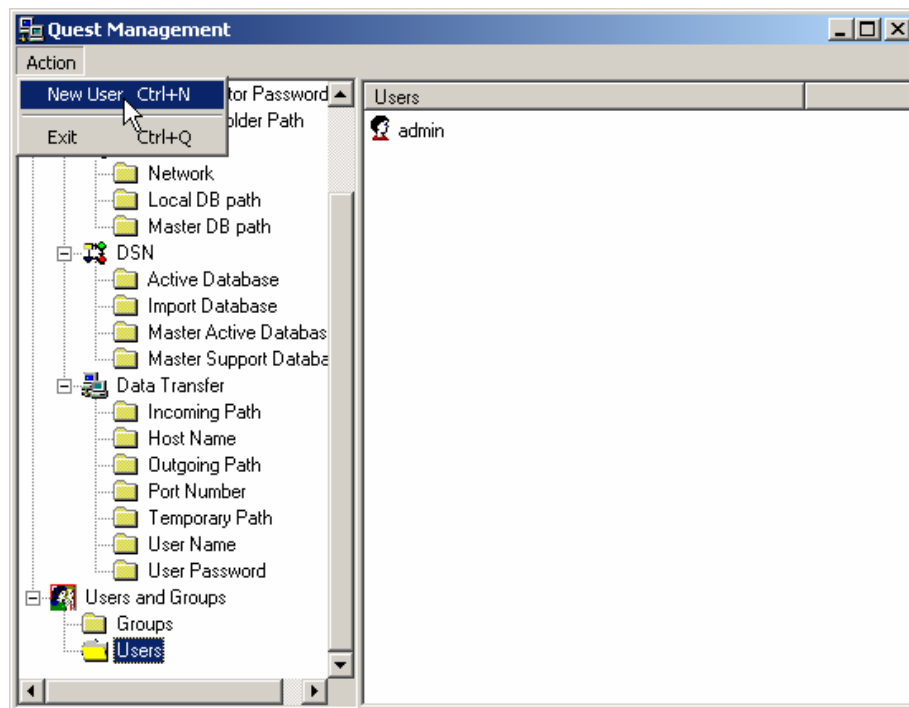
5. Click on the ![] button to select the **User Name**.

6. Type in the Logon Name and Password.

7. Click on the ![] button to select the **Group** the User will be apart of.

8. Click on the Modules tab on the top part of the screen. A list of permissions will appear.
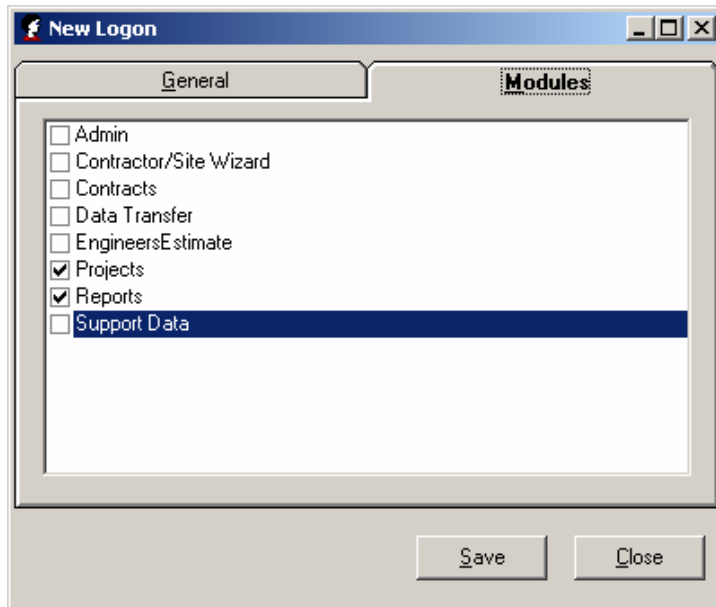
NOTE: The permissions that are checked off depend on what group the user was assigned to. You can edit permissions by clicking in the square left of the permission. A checkmark will appear next to all active permission.

9. After all permissions have been set click the [Save] button.

1.2 Remove an Existing User

1. In the toolbar click on Admin. The **Quest Management** window appears.
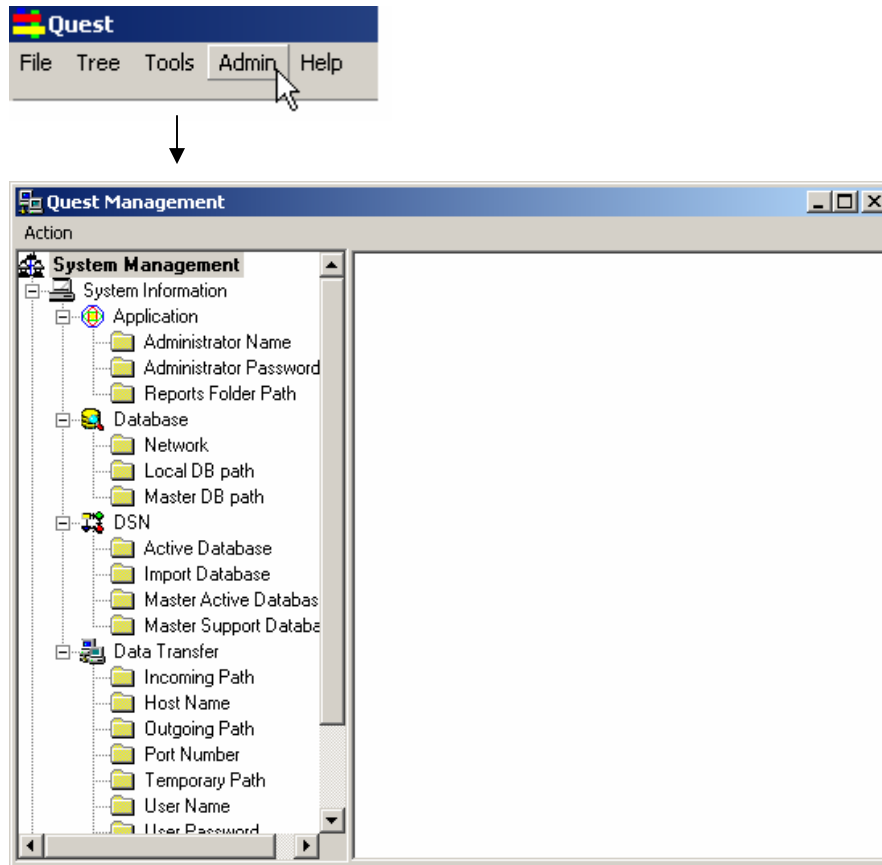
2. Use the scrollbar to locate the User and Group Node in the **System Management** menu.

4. Click on Users. All of the users will be listed on the right side of the **Quest Management** window.
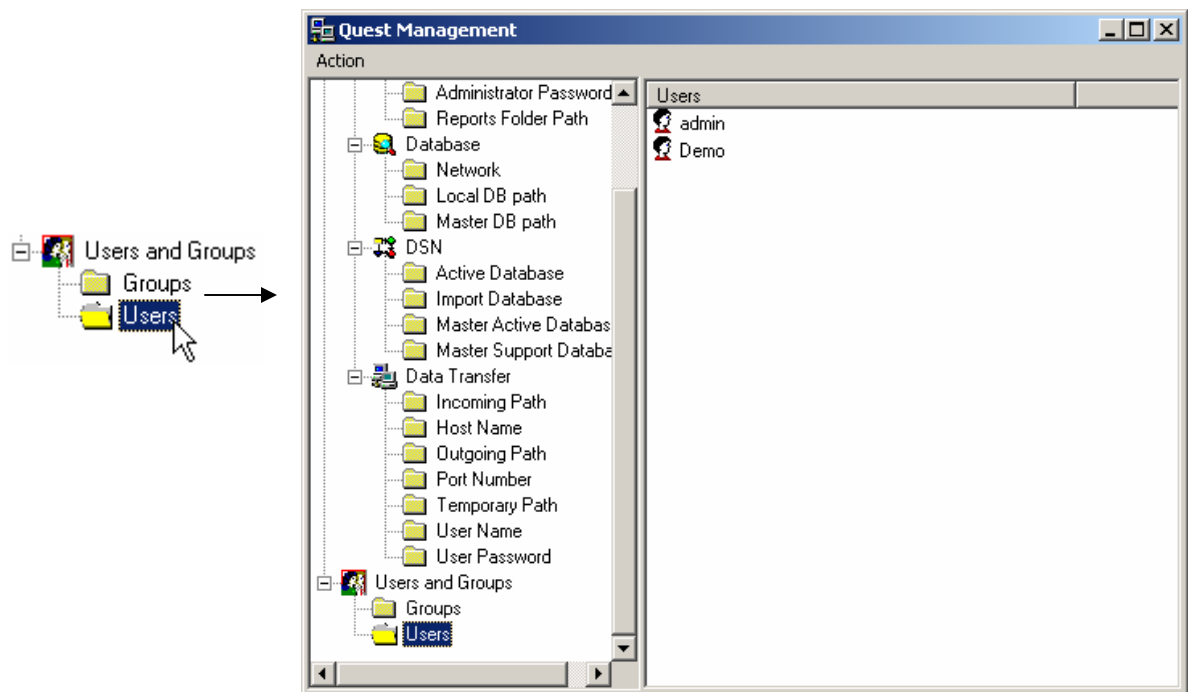
7. Right-click on the User you would like to Remove. A menu appears.

8. Click on Delete User.
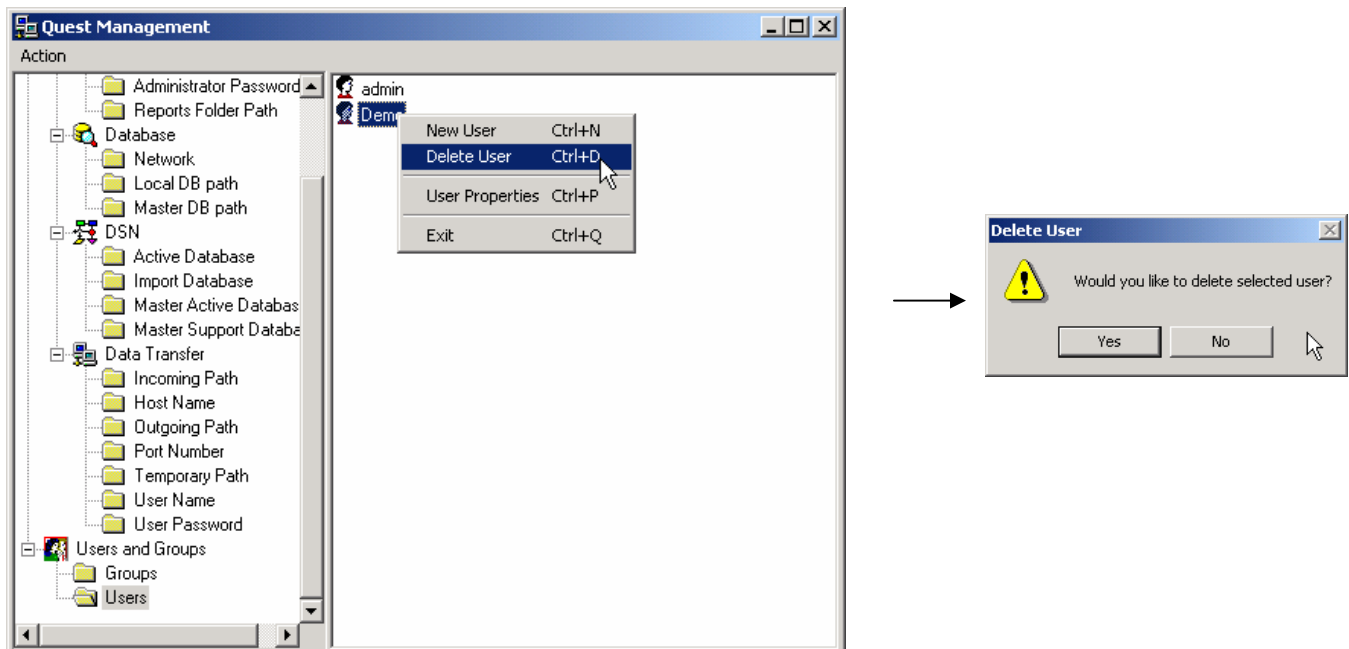
8. Click the [Yes] button.

1.3 Edit User Properties

1. In the toolbar click on Admin. The **Quest Management** window appears.
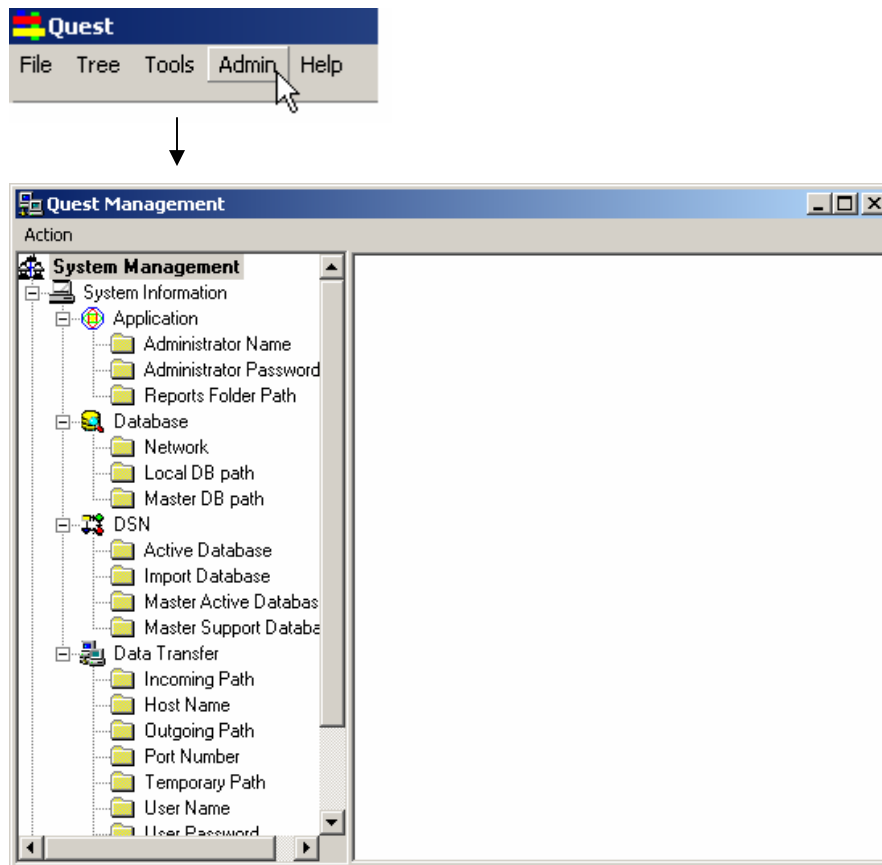
2. Use the scrollbar to locate the User and Group Node in the **System Management** menu.

5. Click on Users. All of the users will be listed on the right side of the **Quest Management** window.
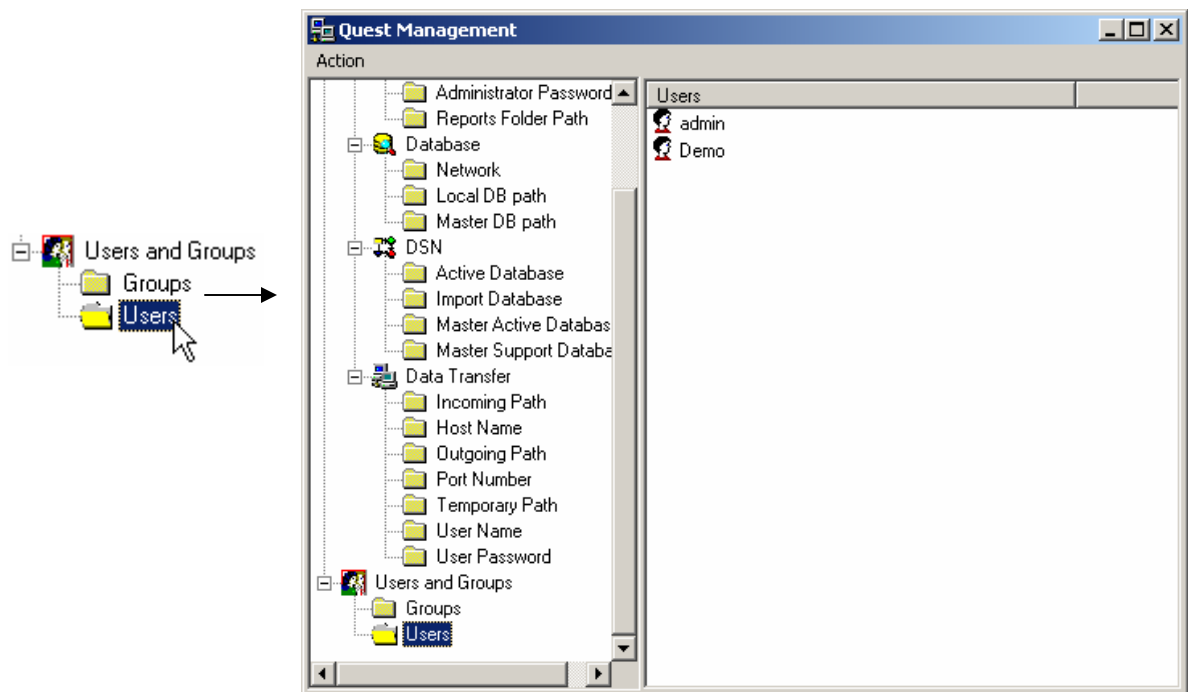
7. Right-click on the User you would like to alter. A menu appears.

8. Click on User Properties.
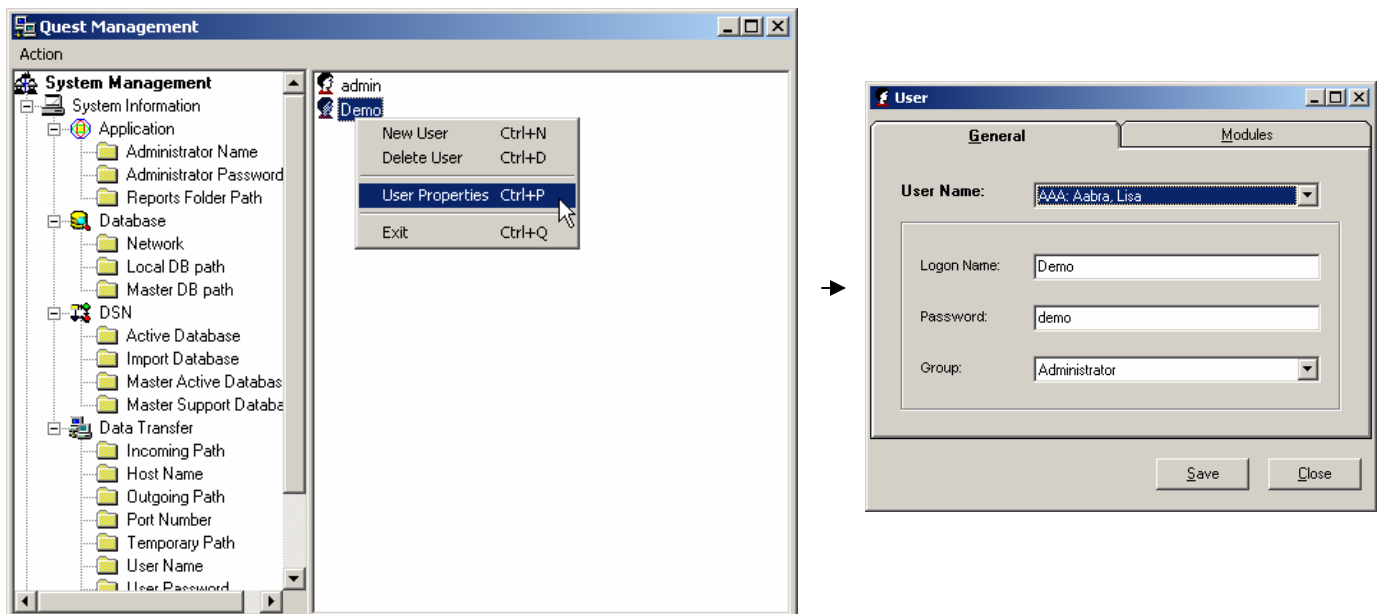
9. Change any information or modules and click .

2. Network Application

NOTE: The Master Database will be updated with all the added and modified project information. The ability to Get and Update Master Data only pertains to Network application of Quest Professional. Please review the section on Rules for the Network Application, before proceeding to use the Network Application.

2.1 Update Master Data

1. In the toolbar click on Tools, Data Exchange, and then Update Master. The **Update Master Database** window appears.
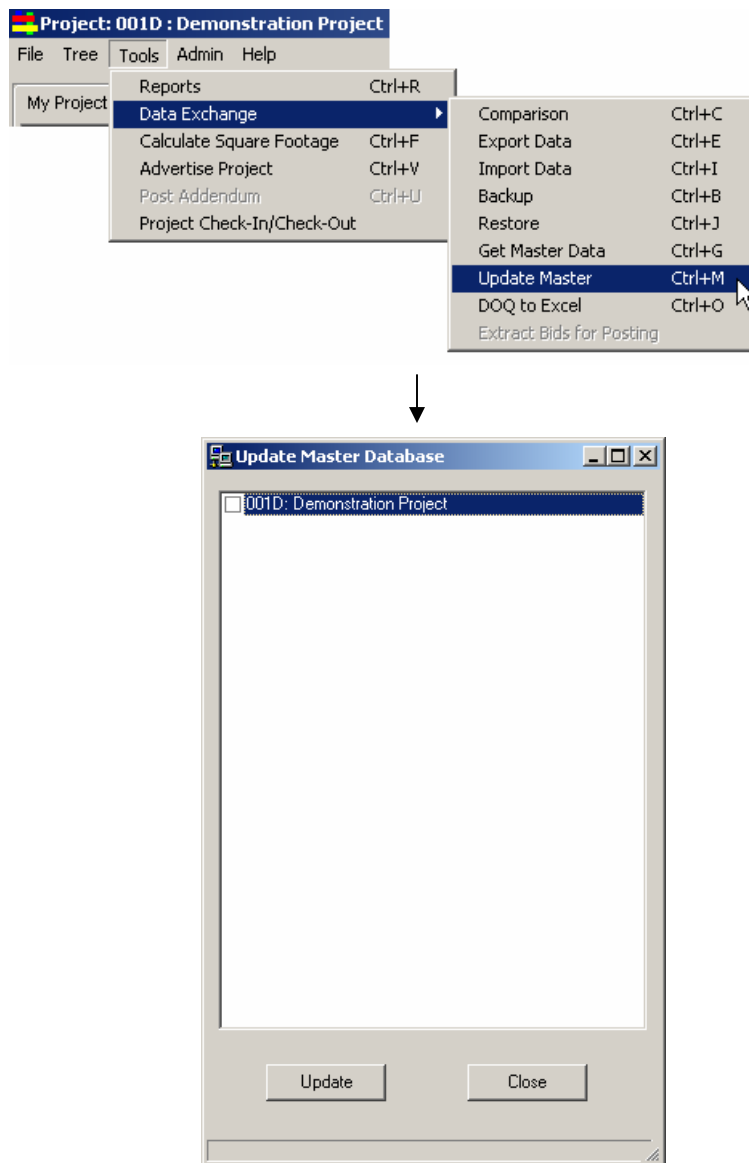
2. Select the file you would like to update in the master database by clicking in the empty square to the left of the project. The box will now appear checked off.

3. Click the [Update] button. The update will initiate. When updating is finished a confirmation message will appear.
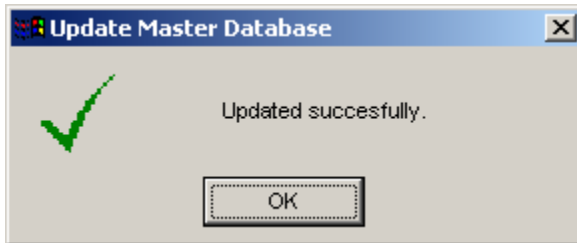
4. Click the [OK] button.

2.2 Get Master Data

NOTE: This function will overwrite all data for the specified project with the project data on the Master Datebase.

1. In the toolbar click Tools, Data Exchange, and then Get Master. The **Get Master Data** window appears.
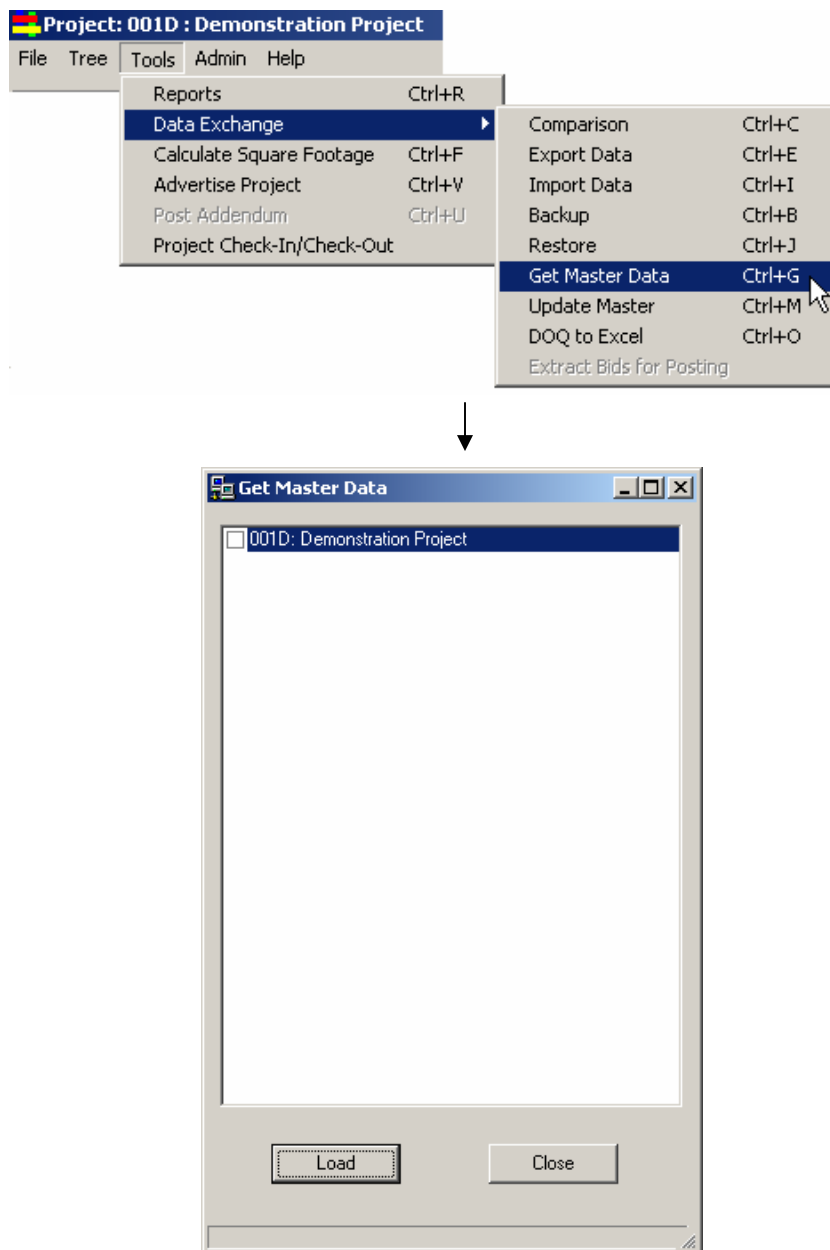
2. Select the file in the master database to be updated on the local machine by clicking in the empty square to the left of the project. The box will now appear checked off.

3. Click the [Load] button. The downloading will initiate, when finished a message will appear.
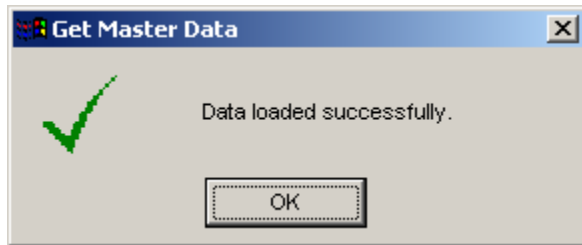
4. Click the [OK] button.

2.3 Project Check In/Out

NOTE: This function is only used for projects that have been advertised.

2.3.1 View Project Check In/Out

1. In the toolbar click on Tools and then Project Check-in/Check-out. The Projects in Addendum screen appears.
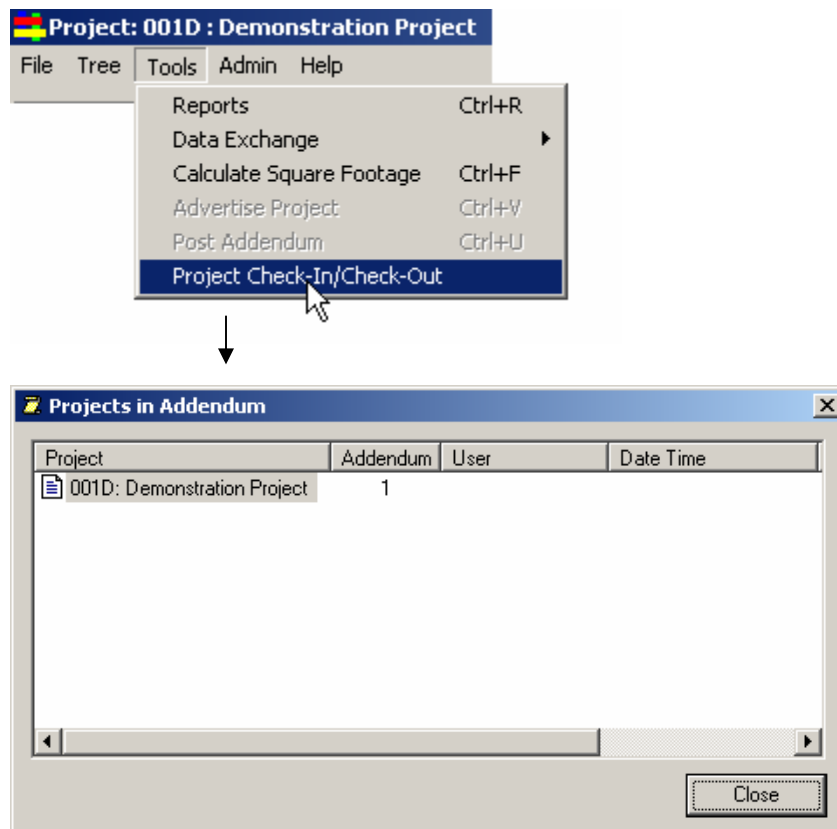
NOTE: All of the projects in the master database that are currently in addenda are listed here.

A project can only be checked out if it is in an addendum and not already checked out.

2.3.2   Check Out a Project

NOTE: When checking out a project, the project data will be overwritten on the local machine with the project data currently residing on the Master Database.

1. Right-click on the project to be check out. A menu appears.
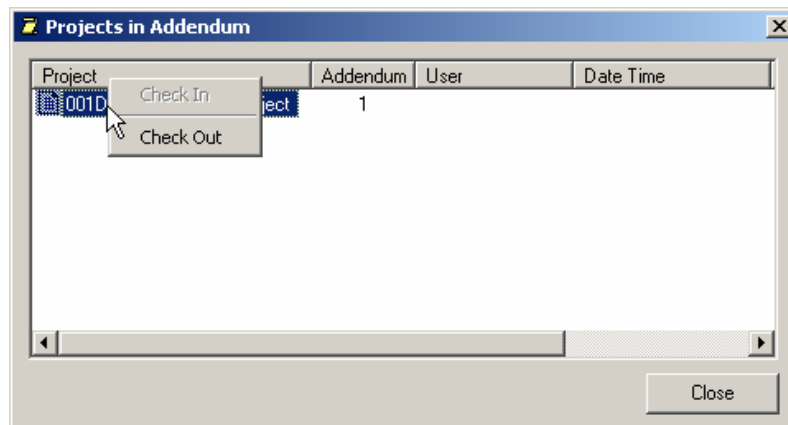
2. Click on the Check Out option. The Project Check Out message appears.
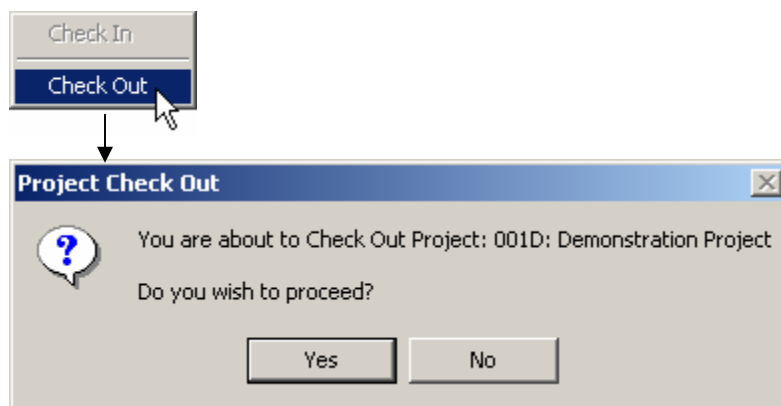
3. Click the [Yes] button. The project has now been checked out.
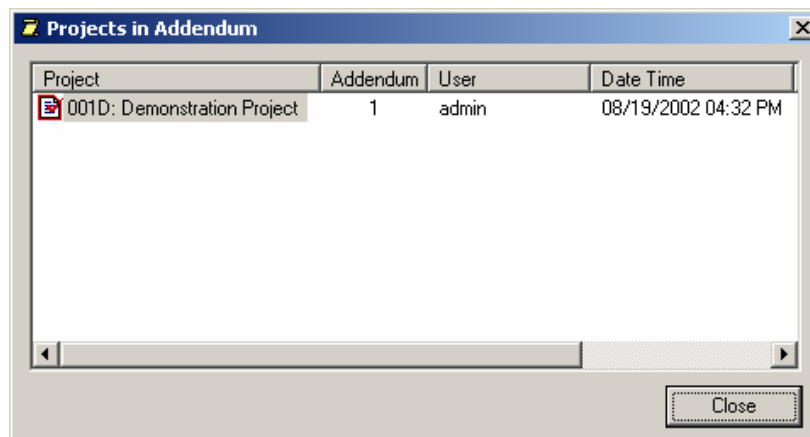
4. Click the [Close] button.

2.3.4   Check In a Project
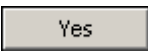
NOTE: The Check-In process will automatically overwrite the Master Database with the project data on the Local Database for the specific project.

1. Right-click on the project you would like to check in. A menu appears.
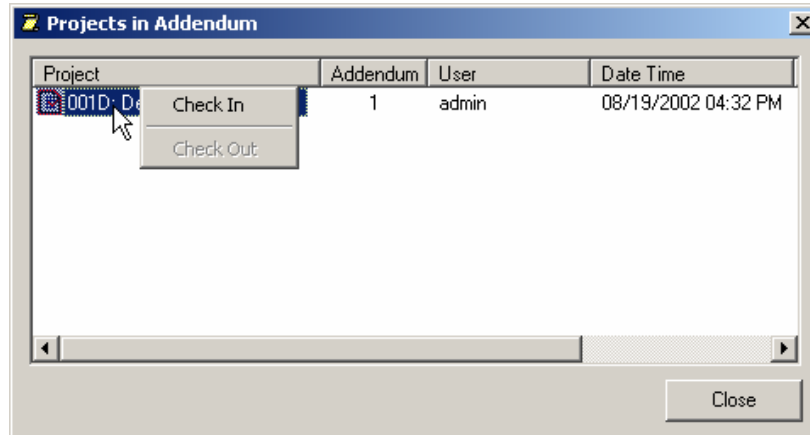
2. Click on the Check In option. The Project Check In message appears.
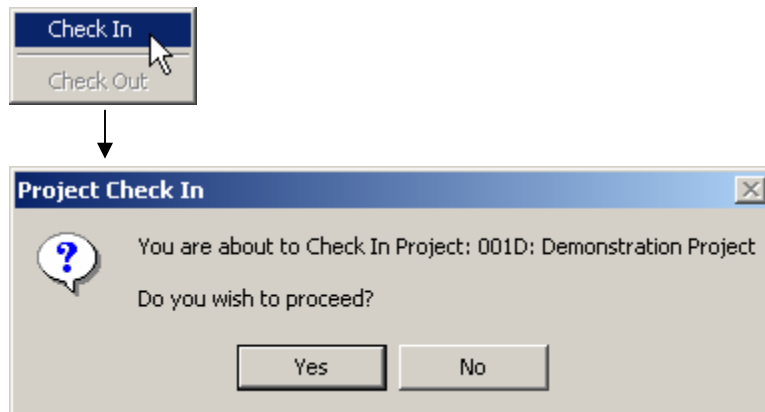
3. Click the [Yes] button. The project has now been checked back in.
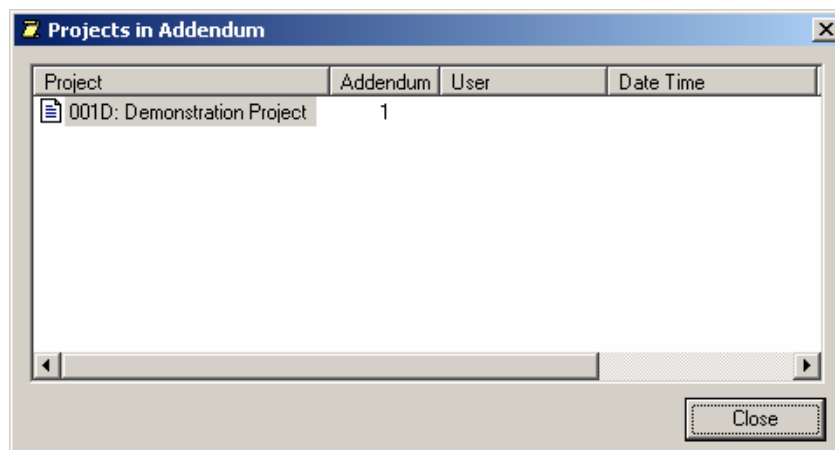
4. Click the Close button.

2.4 Change location of Master Databases

If Active and Master Support Databases (PX07MA.kml, PX07MS.kml) are to be moved to a different location the following steps must be followed:

1. All Quest users must close the application first.
2. The databases can be moved to the new location. They must be placed in the same folder.
3. The DSN settings for each machine using Quest Professional must be modified to point to the new location for the databases.
4. For each machine using Quest Professional:
   a. Select Admin in the file menu. The **Quest Management** window appears.
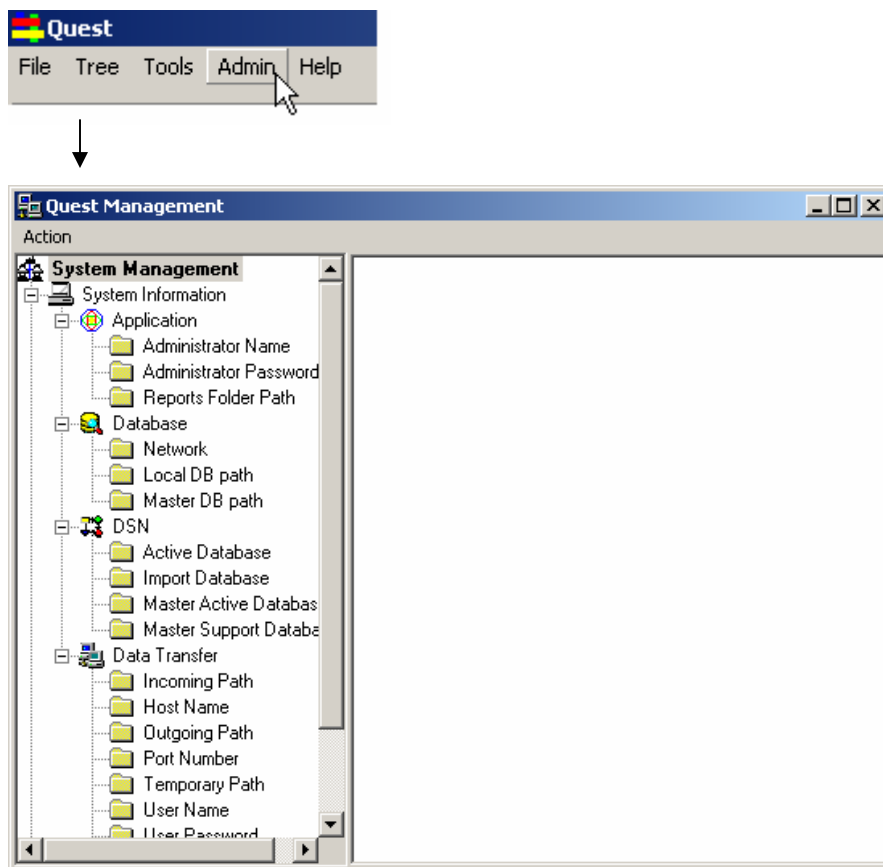
b. In the Databases folder, click on the Master DB Path Folder. To the right is the path to the Master Databases is listed.
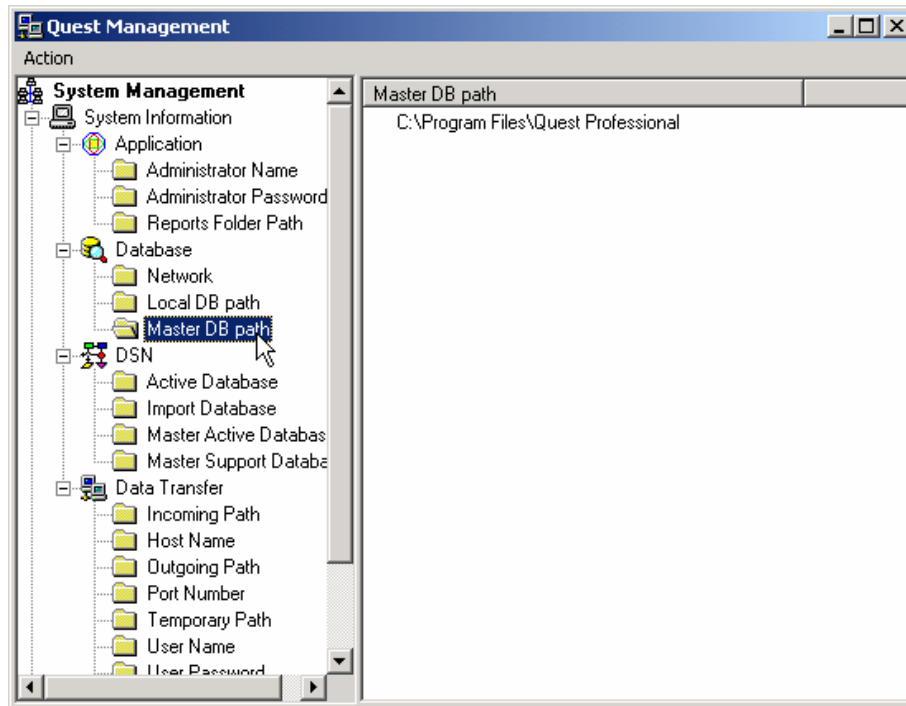
c. Click-once the path. Be sure to move the cursor off the path to enable it to be modified.
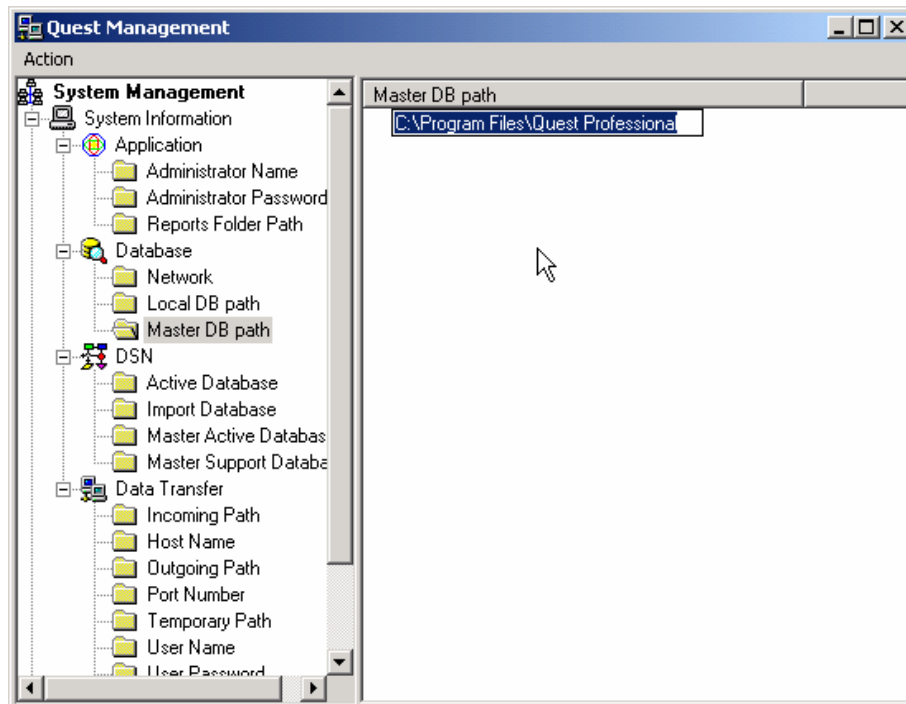
    d. Type in the new path and press Enter.

          NOTE: It is suggested to copy the path from the DSN setting and paste it into here to ensure the correct path is entered.

3. Projects

3.1 Add a Project

1. There are two ways to initiate the creation of a new project.

   a. In the toolbar click on File and select New.
   b. Hold down the **Ctrl** and **N** keys at the same time

2. A window will appear with templates from which to select.
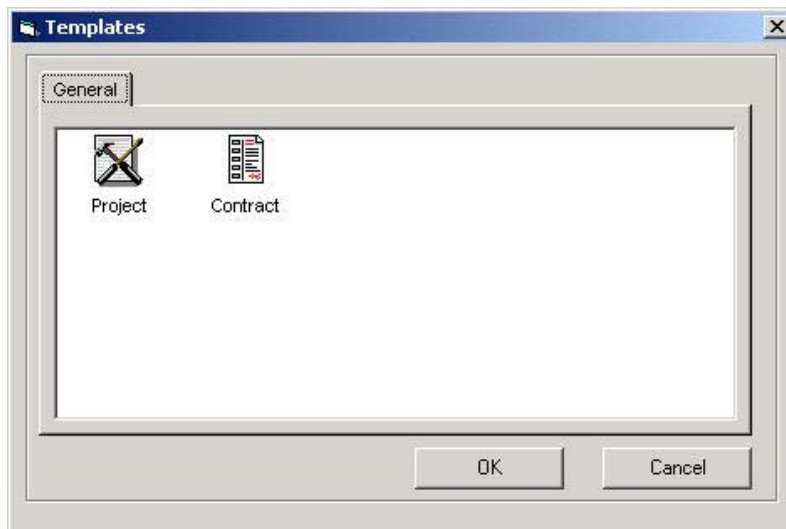
3. Click on the Project icon ▩ Project. The **Project Setup** window appears.

4. In the **Project Setup** window, enter at least the required project information (shaded yellow).

5. For **Project Owner** and **Default Dataset** click the [▼] button to display a menu to choose from.

6. Click the [Apply] button. A message will appear informing you the project has been added.
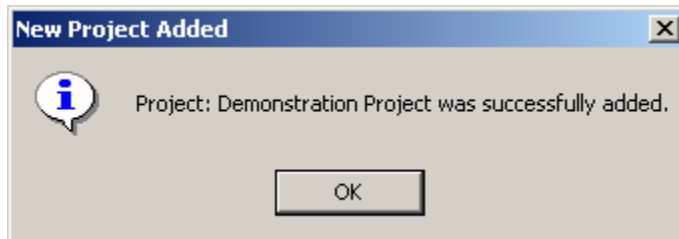
7. Click the [OK] Button.

8. The project has been added in the My Projects Tab under the Projects Folder on the left of the screen. To view, enter, or alter any project information click on the project name once and Project Information appears on the right side of the screen.
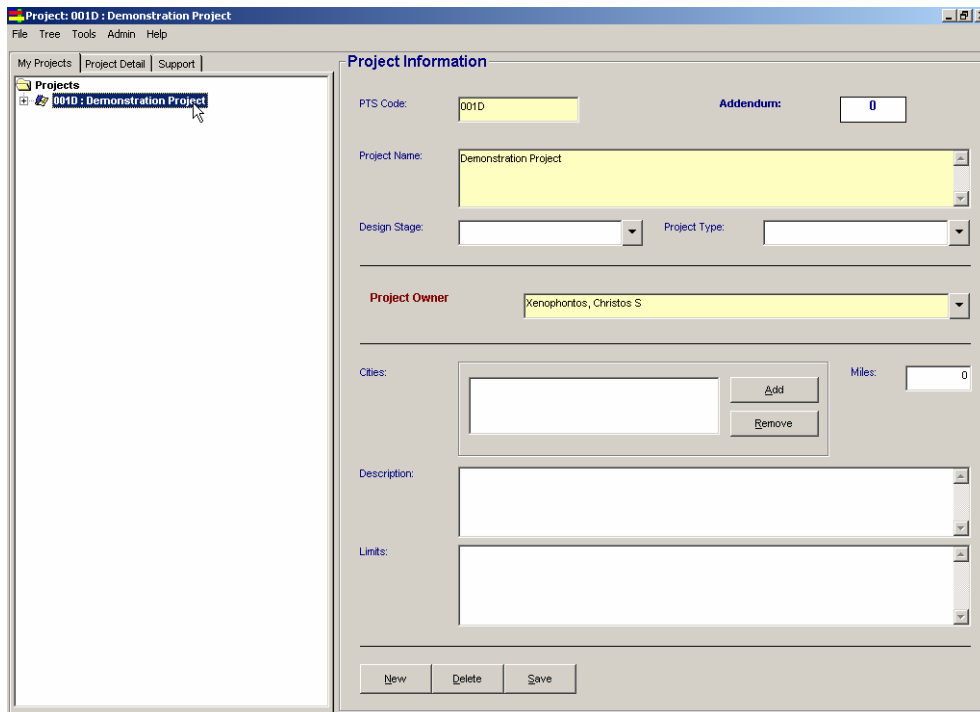
3.2 View Project Information

1. Click on the My Projects Tab
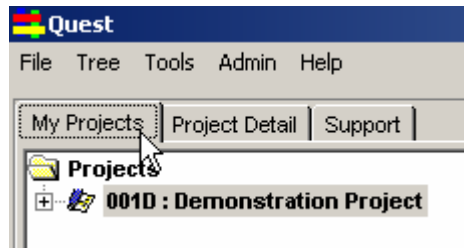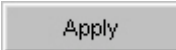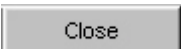
2. Click on the Project Name under the Projects Folder. The Project Information will be displayed to the right.
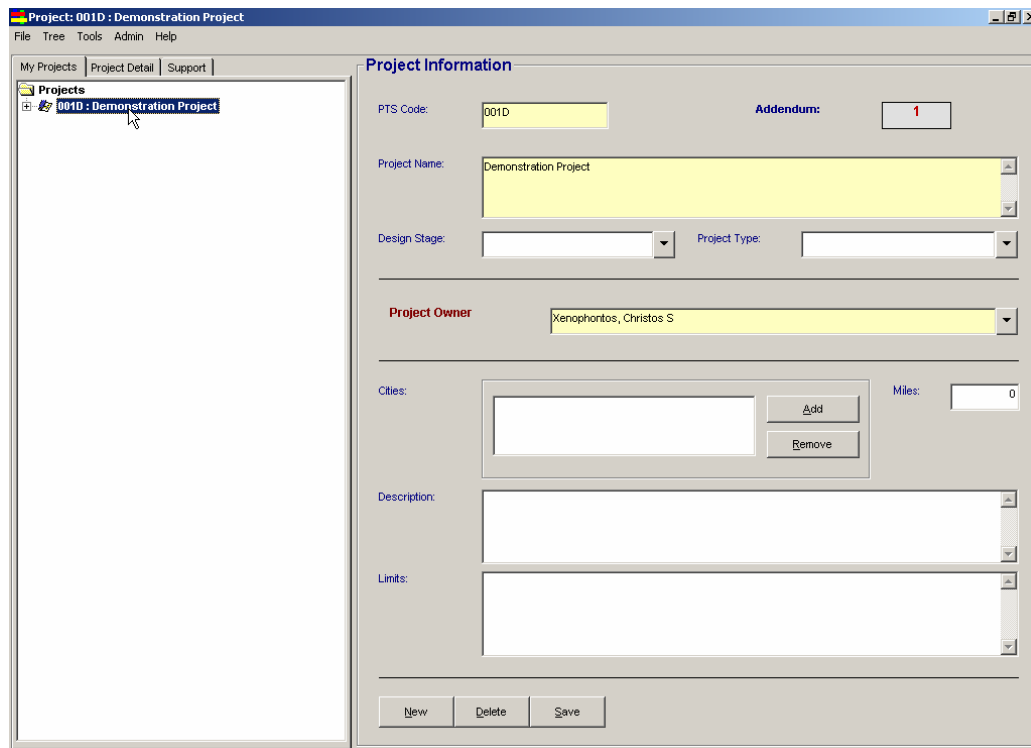
3.3 Add a City to a Project

1. In the **Cities** text box click the [Add] key select the cities or towns in which the project takes place

    a. The Add Project Location box appears.
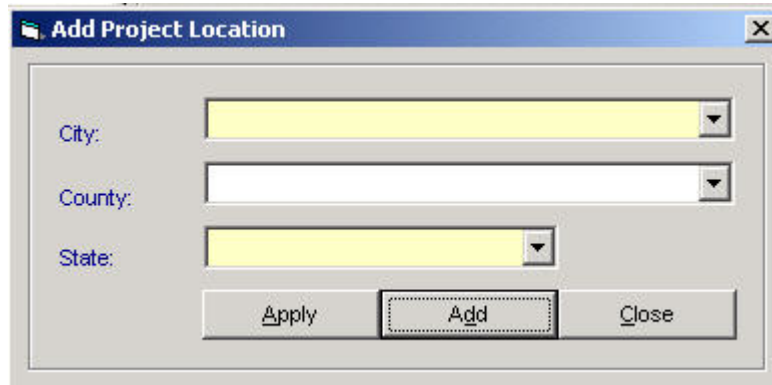
    b. Click the [▼] key to the right of the highlighted City text box to scroll down and select a city.
    c. When a city is selected the state drop down box will default to the state the city is located in.
    d. If there is more then one state the city name is located in, the state drop down box will display the choices. Click the [▼] key to the right of the state drop down box and click on the appropriate state.
    e. Click the [Apply] button.
    f. If another City needs to be added click the [Add] button.
    g. Repeat steps 3:b through 3:e until all cities located in the project have been added.
    h. When finished click the [Close] button.

3.3 Delete a Project
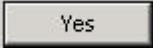
Standalone Application
1. Click on the Project Name of the project you want to delete. The Project
    Information will be displayed to the right.
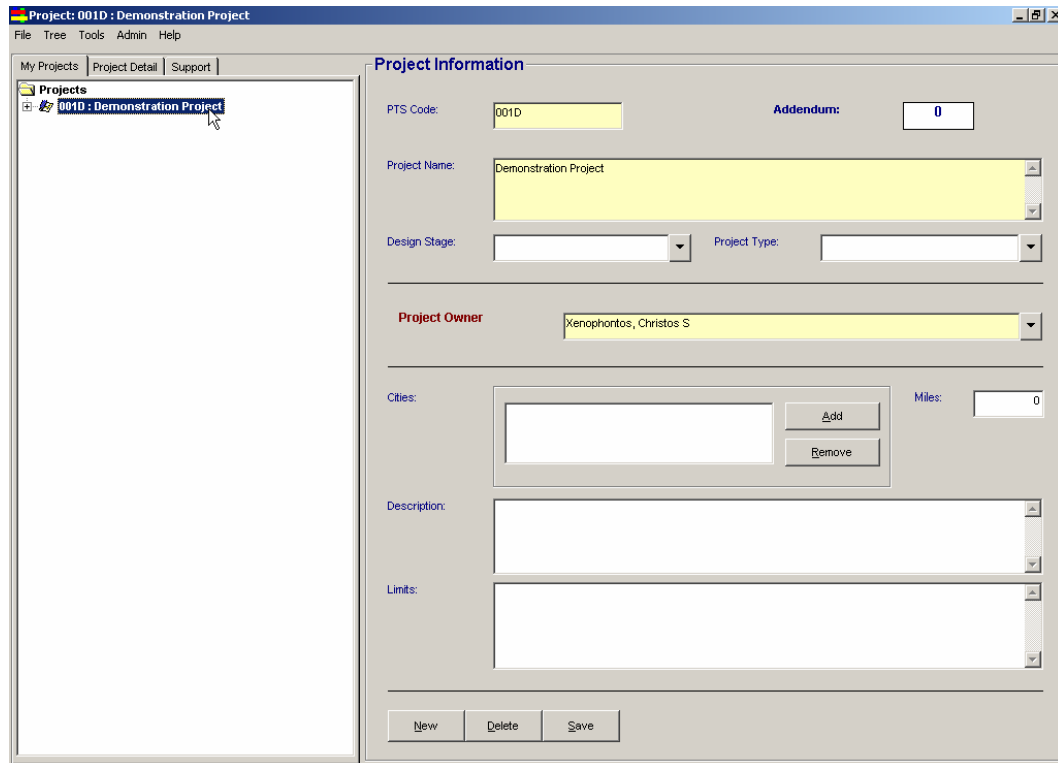
2. Click the [Delete] button.
3. A Message Box will appear confirming the project should be deleted.
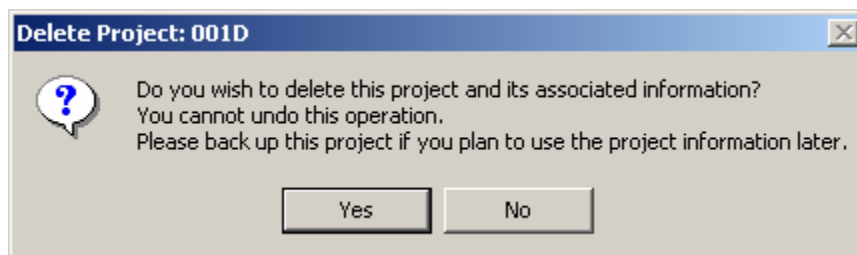
4. Click the [Yes] button to confirm the deletion. A message appears informing you the project has been deleted.
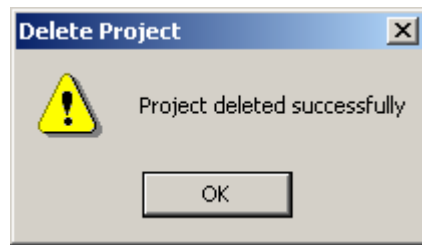
5. Click the [OK] button.

NOTE: When deleting the project, the project is completely removed from the Program.

Network Application

1. Click on the Project Name of the project you want to delete. The Project Information will be displayed to the right.

2. Click the [Delete] button.

3. A Message Box will appear specifying how the project should be deleted.

4. Select one of the three options by clicking in the circle next to the option. You can decide to:

   a. Delete the project from the local machine (leaving the project in the master database)
   b. Delete the project from the master database (leaving the project on your local machine)
   c. Delete the project from both local machine and master database (the project will be completely removed from the local and Master Database)

5. Click the [Ok] button to confirm the deletion. A message appears informing you the project has been deleted.
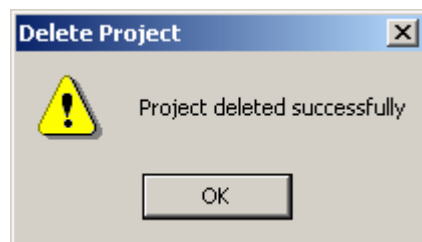
6. Click the [OK] button.

NOTE: When deleting the project, the project is completely removed from the Program.

4. Contracts

4.1 View Contract Screen

1. In the [My Projects] tab of the tree view, click on the ⊞ sign to left of a project name to expand the project menu.

2. Click once on the Contracts node. The Contract Information appears on the right side of the screen.
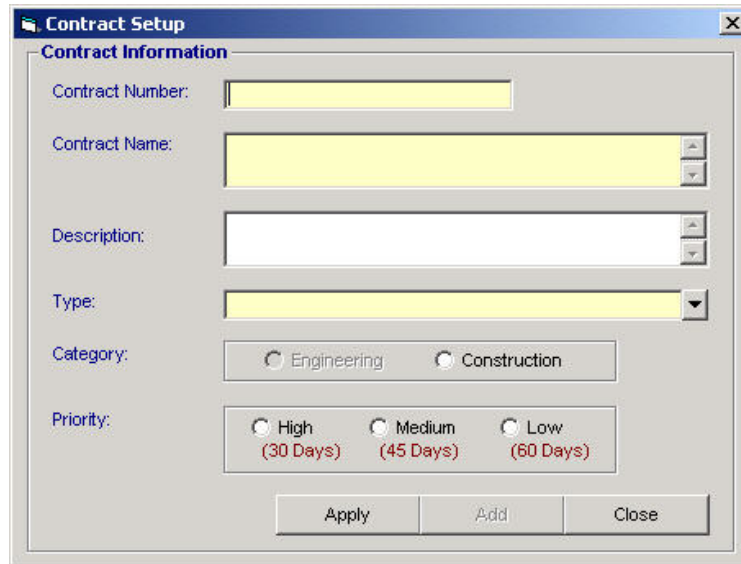
4.2 Add a Contract

1. Click the [New] button located at the bottom of the Contract Screen. The Contract Setup window will appear.

2. Enter the information for at least the required fields (Shaded Yellow).

    a. The Contract Number is the RIC Number for the Contract.

    b. In the Type section, click on the [▼] button to view all possible contract types. Select the appropriate contract type.

    c. In Category click once in the circle left of either Engineering or Construction. **Currently Construction is the only available option.**

    d. In Priority determine the level of urgency by clicking once in the circle left of either choice.

3. Click the [Apply] button to save the new contract information. A Confirmation Message will appear stating the contract has been successfully added.
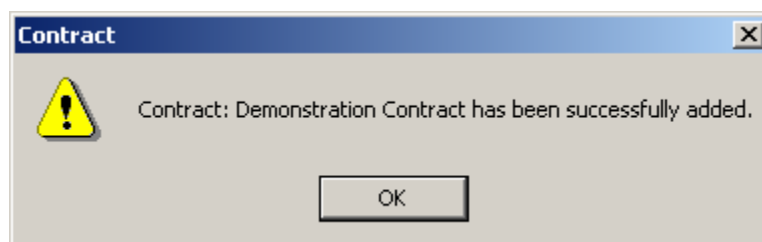
4. Click the [OK] button on the confirmation message.

5. Click [Close] in the Contract Setup window to exit the Contract Setup Screen. The newly created Contract will now be displayed.

4.2 Contract Dates

    4.2.1 Add Contract Dates

1. The Contract Dates are located in the bottom left of the contract screen. Click the Add Button. The Contract Dates Window will appear.
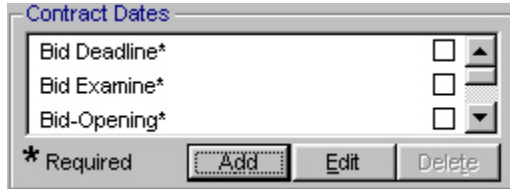
NOTE: To add a Contract Date that does not appear in the pull-down menu (customized) follow the instructions for Support Tab/Contract Dates.
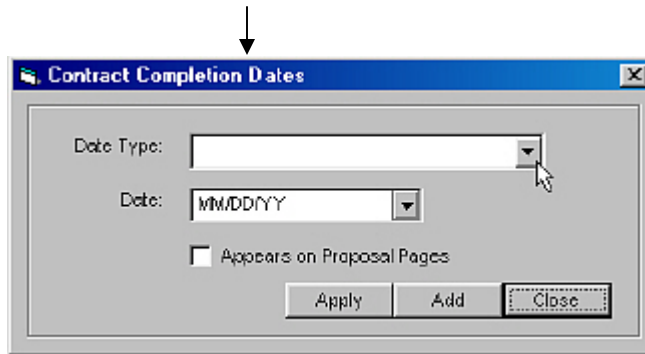
2. Click the [Add] Button.
3. Click the ▼ key, to the right of the Date Type text box, to scroll down and select the date type.
4. Either type the date manually in the **Date** text box in the month/day/year format. (Ex. 1/31/02) or click on the ▼ key. A calendar will appear. Use the arrows at the bottom of the calendar to scroll through the months and click on the date.
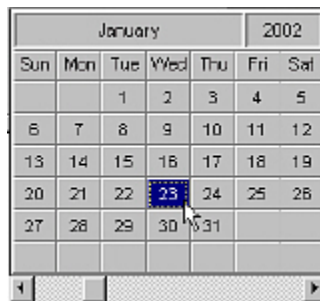
5. If the date should appear on the Proposal Pages click on the white box to the left of Appears on Proposal Pages.
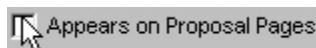
6. Click the [Apply] button.
7. To enter another date, follow steps 2-6.
8. When completed adding dates to the contract, click the [Close] button.

4.2.2 Edit a Contract Date

1. Click on the Contract Date to be edited.
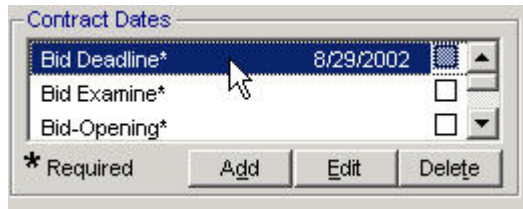
2. Click the ⟨Edit⟩ button.
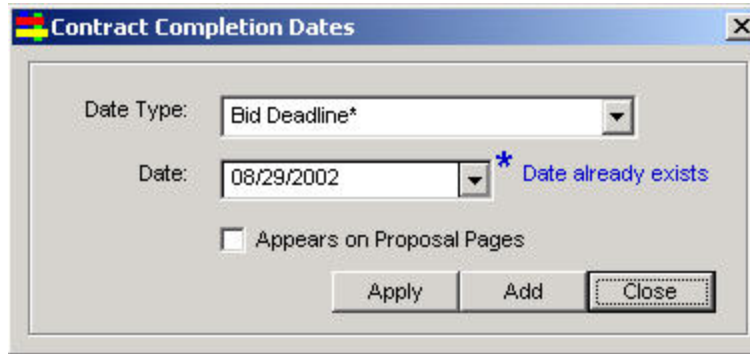
3. Click the ⟨▼⟩ key, to the right of the Date Type text box, to scroll down and select the date type.

4. Either type the date manually in the **Date** text box in the month/day/year format. (Ex. 1/31/02) or click on the ⟨▼⟩ button. A calendar will appear. Use the arrows at the bottom of the calendar to scroll through the months and click on the date.
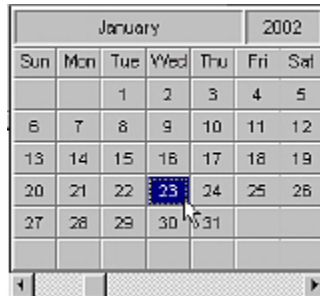
5. If the date should appear on the Proposal Pages click on the white box to the left of Appears on Proposal Pages.
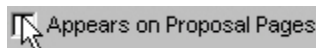
6. Click the ⟨Apply⟩ button.
7. Click the ⟨Close⟩ button.

4.2.3 Delete a Contract Date

1. Click on the date to be deleted.
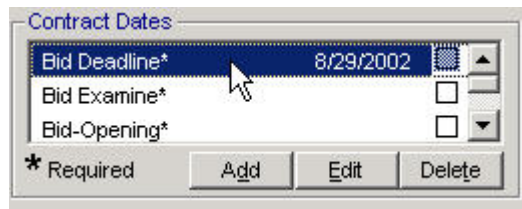
2. Click the [Delete] button. A message will appear to confirm the date should be deleted.
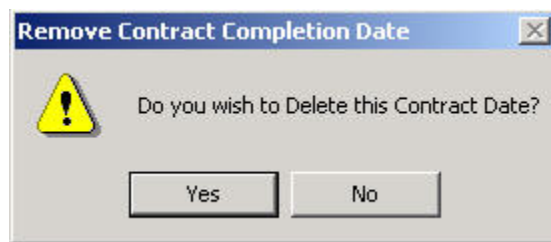
3. Click the [Yes] button to confirm the deletion of the contract date.

NOTE: This will remove the date from the date type.

4.3 Certification Documents

NOTE: The Content in the Certification Documents cannot be edited.

1. The Certification Documents are located in the bottom right of the contract screen.

4.3.1 View Contract Dates

1. Click the ⟦ Add ⟧ button. The Bidder Certification Documents Window will appear.
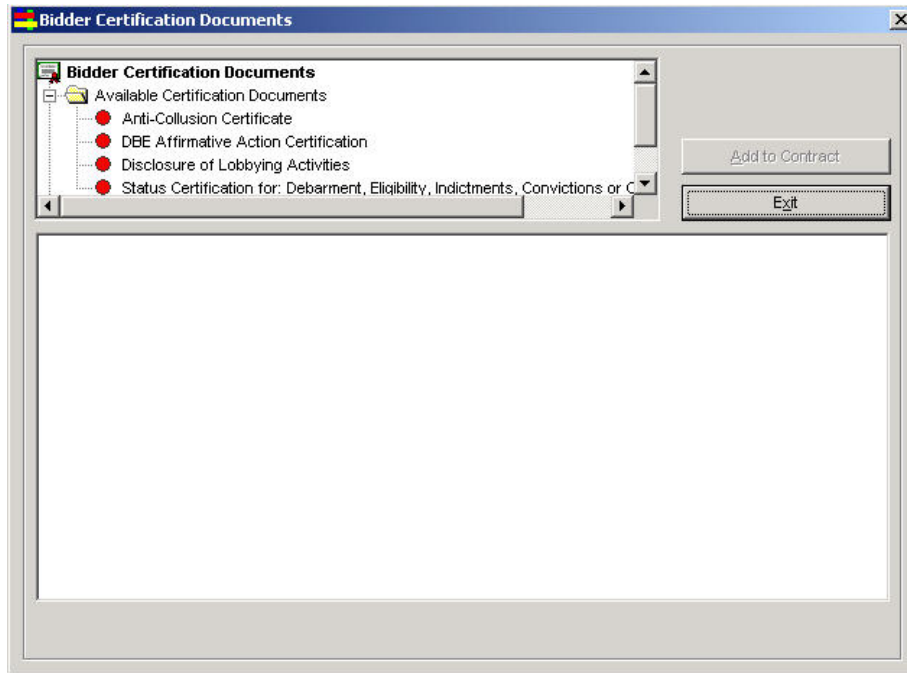
2. To view any of the documents listed, click on the name of the document you wish to view. The document will appear below.
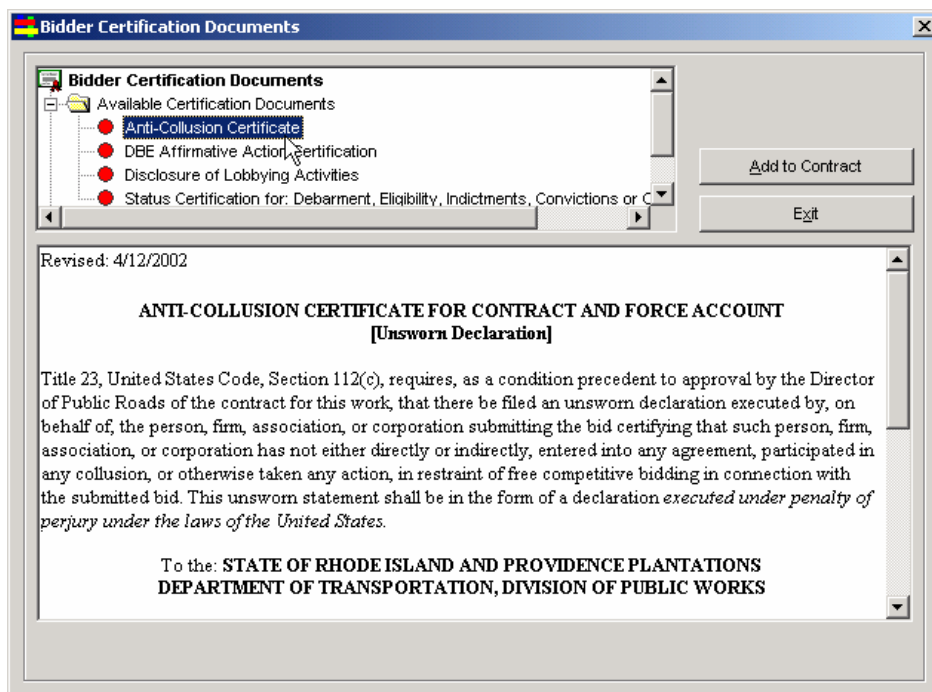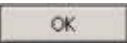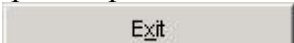
4.3.2 Add Certification Documents

1. Click the [Add] button. The Bidder Certification Documents Window will appear.
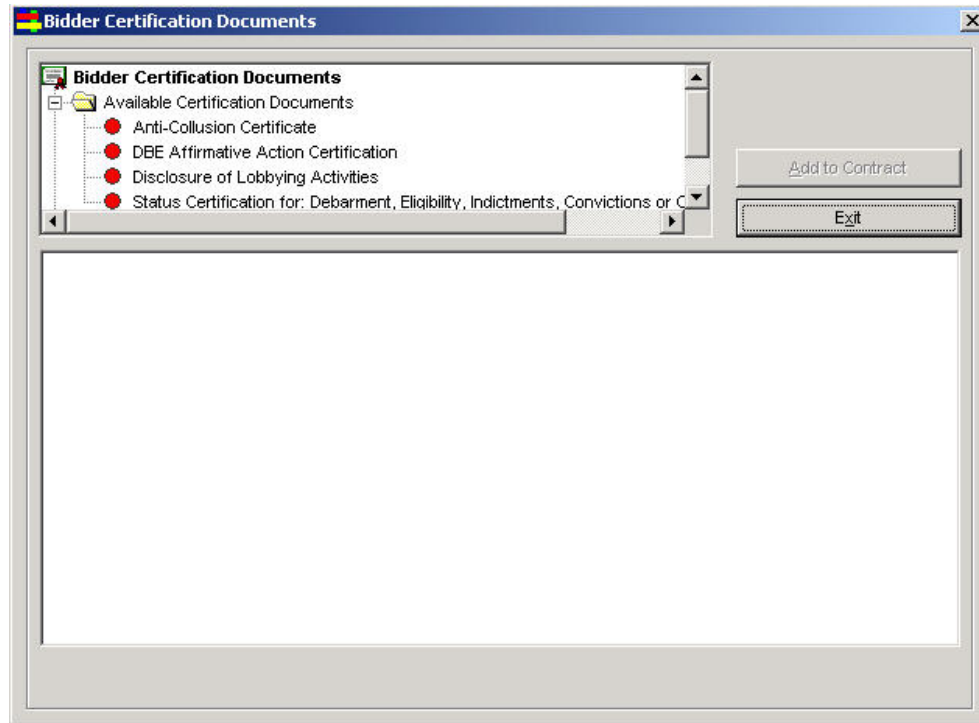
2. The Red Dot 🔴 indicates the document is not currently part of the Contract. The Green Dot with the checkmark ✅ indicates the document is currently part of the Contract.
3. To add a Bidder Certification Document to the Contract, Click on the Certification Document located under the Available Certification Document.
4. Click the [Add to Contract] button. A message will appear similar to below confirming the Certification Document has been added to the Contract.

5. Click the [OK] button.
6. To add another document repeat steps 3-5.

7. When completed, click the [Exit] button.

4.3.3 Remove Certification Documents

There are two ways to remove Certification Documents.

The Contract Information Screen

1. Click on the Certification Document to be removed from the Contract.

2. Click the [Remove] button. A Message will appear confirming the Certification Document is to be removed from the Contract.

3. Click the [Yes] button.

The Bidder Certification Documents Window

1. Click the [Add] button. The Bidder Certification Documents Window will appear.
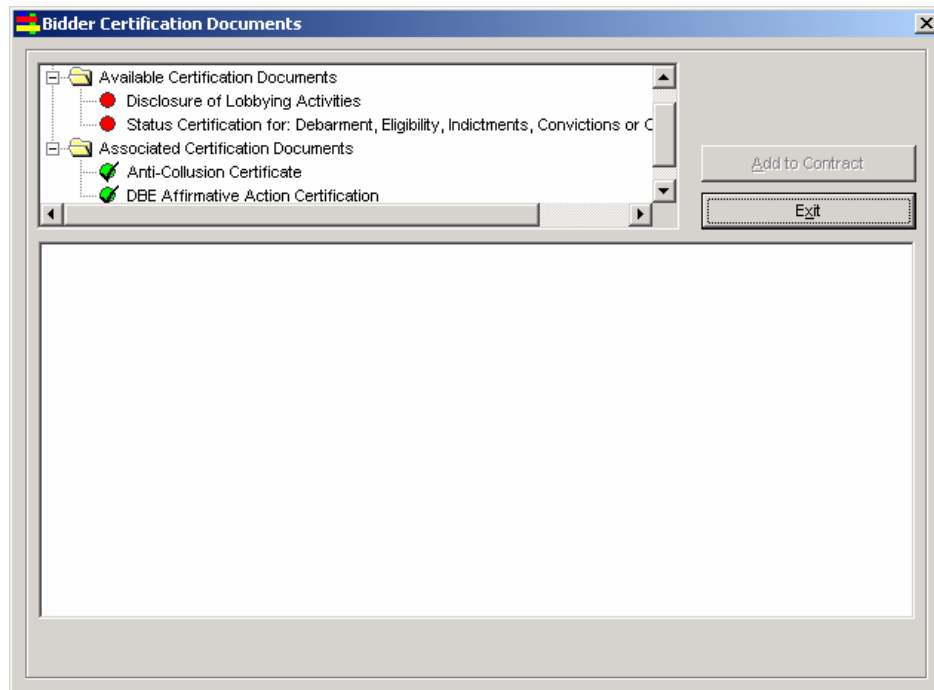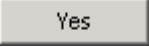
2. Click on any of the Associated Certification Documents to be removed. The Document will be displayed below.

3. Click the [Remove from Contract] button. The Following message will appear.
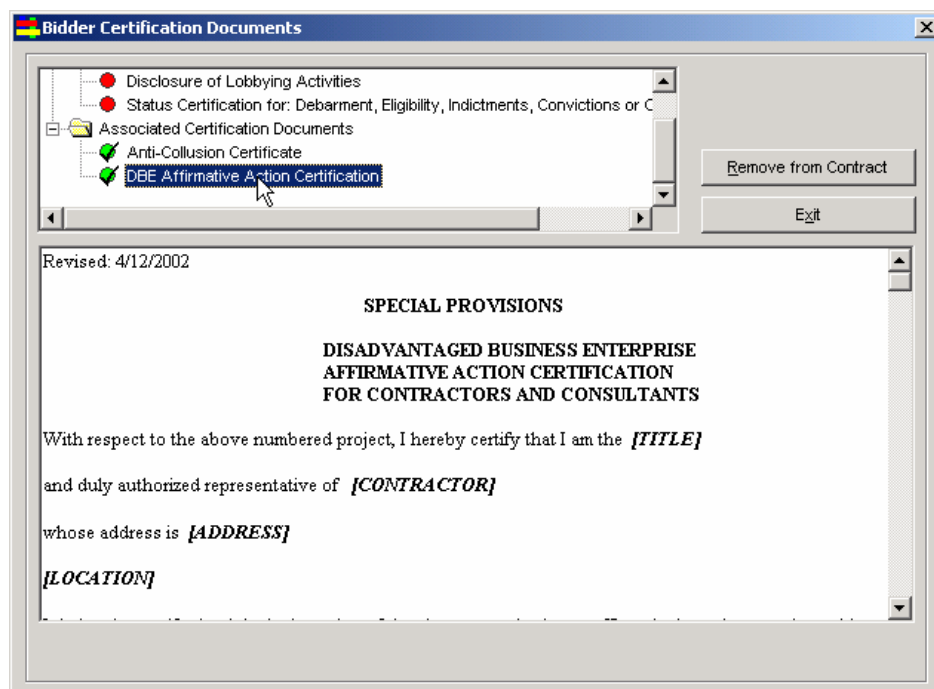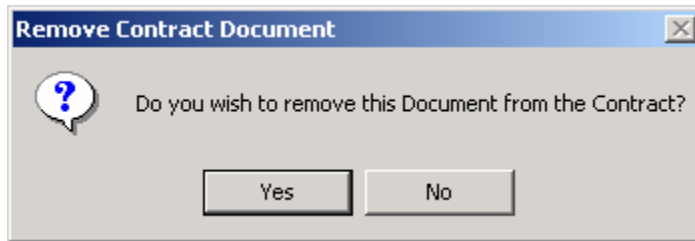
4. Click the [Yes] button.

5. Items

NOTE: Please review the rules pertaining to Items.

5.1 View Item Detail Screen

1. In the My Projects tab of the tree view, click on the ⊞ sign to left of a project name to expand the project menu.
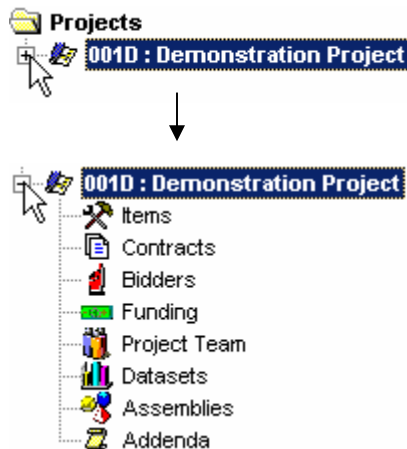
2. Click once on the ⚒ Items node. The Item Detail menu appears on the right side of the screen.

Job Specific Item Setup

Set Pricing

Mark Deleted
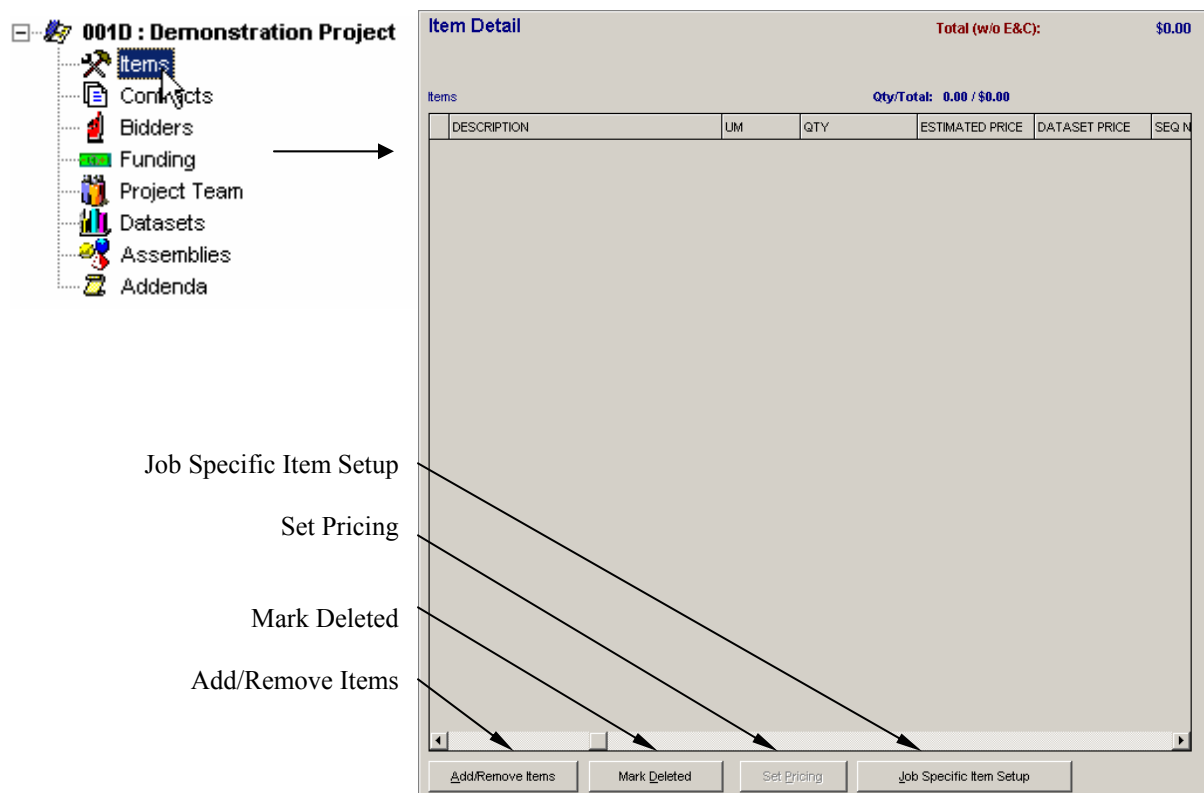
Add/Remove Items

5.2 Add an Item

1. Click on the [Add/Remove Items] button in the bottom left hand corner. The Select/Remove Project Items menu appears.
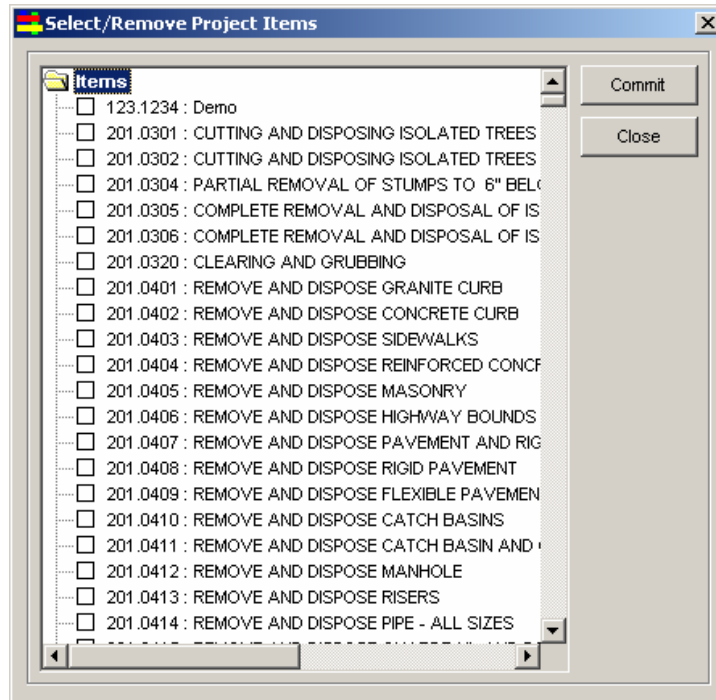
2. Select all items to be added to the project by clicking once in the ☐ box. The box will now appear checked ☑.

3. When all items have been selected click [Commit] button. A **Project Items** message appears informing you that all items have been successfully added.
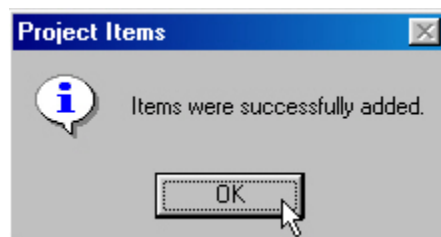
4. Click [OK].

5. Click [Close] in the Select/Remove Project Items menu.

6. The items selected are now displayed in the Item Detail screen.

NOTE: More items can be added to the project later by repeating all previous steps.
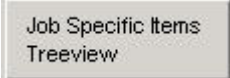
5.3 Add a Job Specific Item
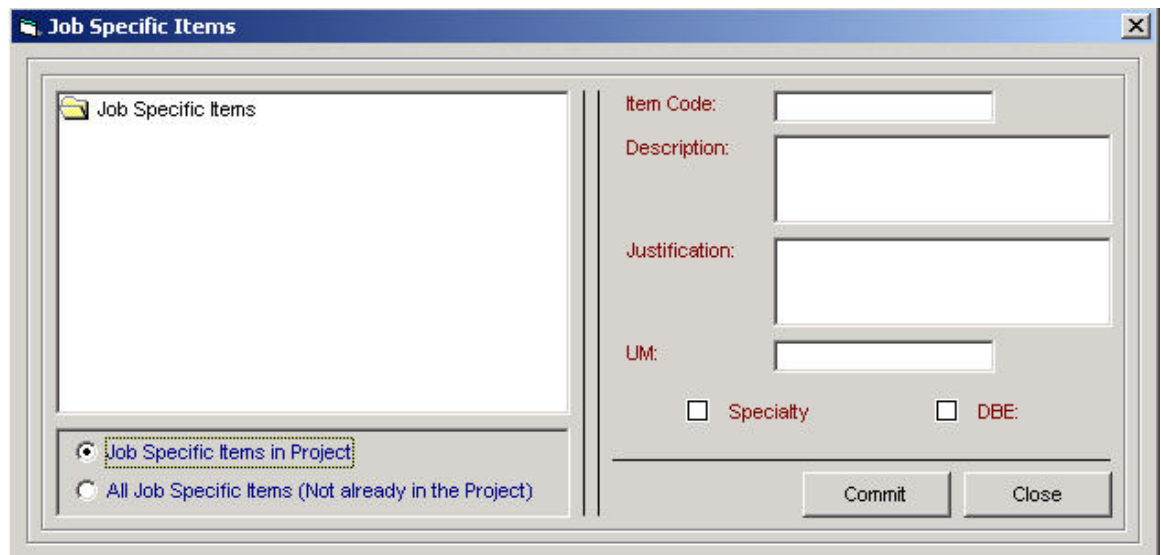
1. Click the [Job Specific Item Setup] button.
2. The **Job Specific Item Setup** window appears.

                Add   Edit   Cancel   Delete   Apply   Close

3. Click the [Add] button.
4. Notice in the **Item Code** box ___.99__ appears. Type the item's proper item code here. The proper entry is AAA.99NN. A = Alpha-numeric   N=Numeric
5. To set the Unit of Measure click on the ▼ button to the right of the **UM** box. The following menu appears.

6. Select the correct Unit of Measure by clicking on it. The selected UM now appears in the **UM** box.
7. Enter the job specific description in the **Description** box.
8. If the Job Specific Item is a Specialty Item and/or a DBE, check the box for each one that pertains to the Job Specific Item.
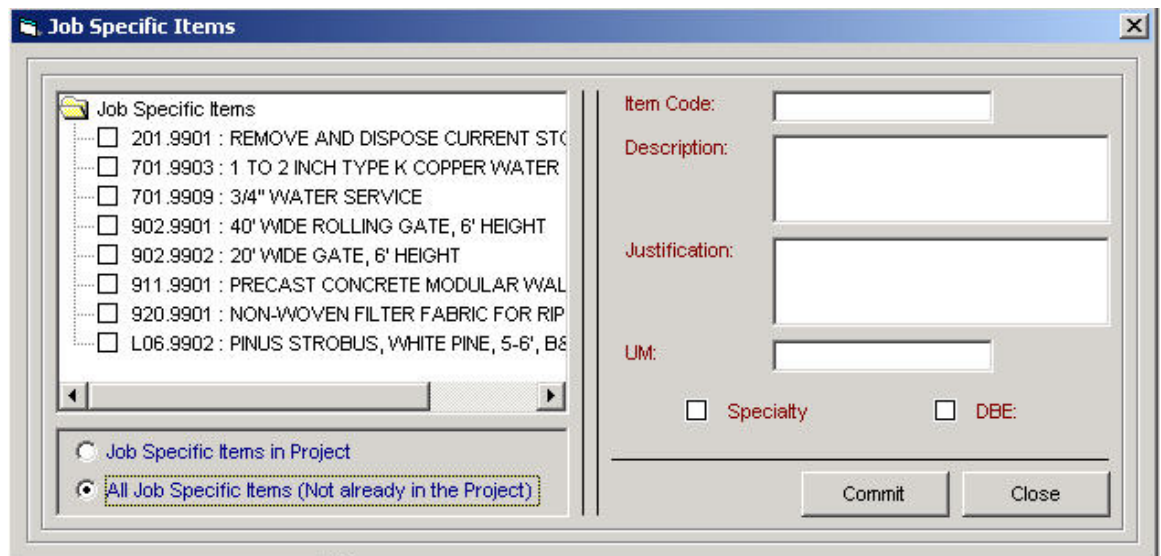
9. If needed enter the item's justification for creation in the **Justification text** box.
10. When completed entering the information for the item, click [Apply].
11. To add another Job Specific Item to the Project, click the [Add] button.
12. To add Job Specific Items that are in another project:

a. Click the [Job Specific Items Treeview] button.
b. A window will appear for user to view Job Specific Items already in the current project and Job Specific items in other projects and not already in the current project.

c. Click on the option All Job Specific Items (Not already in the Project.

[•] All Job Specific Items (Not already in the Project)

d. The Window will display all Job Specific Items that were created in other projects in Quest Professional and are not in the current project.

e. Check the box to the left of the appropriate Job Specific Items to be added to the current project.

f. When a Job Specific Item is checked, the information will be displayed to the right.

g. When all Job Specific Items have been selected for addition to the project click the [Commit] button.

h. Click the [Close] button.

13. When completed adding Job Specific items to the current project, click the [Close] button.

5.4 Set Pricing for Minimum & Only Acceptable Bid Prices

1. To set a price for an item click once on the item's name in the DESCRIPTION column. The name will appear highlighted

2. Click the [Set Pricing] button. The **Set Item Pricing Limitations** window appears.

3. Select the Pricing Limitation Type Option to the left of either option.
4. Type the desired price on the text box.
5. Click the [Accept] button.
6. A message box will appear to confirm the set price has been added successfully to the item.

    or

7. Click the [OK] button.

8. Click the [Close] button on the **Set Item Pricing Limitations** window.

5.5 Delete an Item

5.4.1 With Mark Deleted Button

1. Click once on the item's name in the DESCRIPTION column. The name will appear highlighted.

	ITEMCODE	DESCRIPTION	UM	QTY	ESTIMATED PRICE	DATASET
	201.0302	CUTTING AND DISPOSING ISOLATED TREES AI	EACH	2.00	$25.00	
	201.0306	COMPLETE REMOVAL AND DISPOSAL OF ISOL	EACH	0.00	$0.00	
	201.0409	REMOVE AND DISPOSE FLEXIBLE PAVEMENT	SY	0.00	$0.00	
	701.0554	REINFORCED CONCRETE PIPE M 170 CLASS V	LF	0.00	$0.00	
	701.0615	REINFORCED CONCRETE PIPE M 170 CLASS V	LF	0.00	$0.00	

Item Detail   Total (w/o E&C): $50.00

201.0409 :   REMOVE AND DISPOSE FLEXIBLE PAVEMENT

Items   Qty/Total: 0.00 / $0.00

2. Click the [Mark Deleted] .

3. The Delete Project Item menu appears.

Delete Project Item

❓ Do you wish to delete this Item and its associated Sub-Items?

[Yes]   [No]
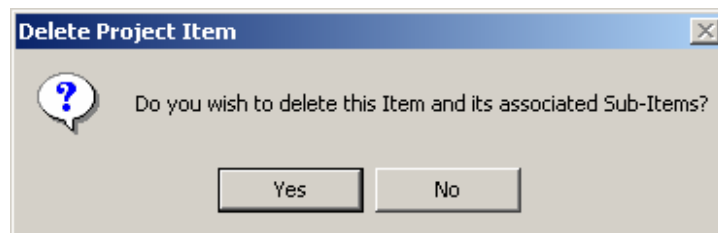
4. Click the [Yes] button.

NOTE: If items are deleted in an addendum, the items will appear:

In the Items table in red highlighted row.

In the **Project Detail** Tab with a red X next to the deleted item.
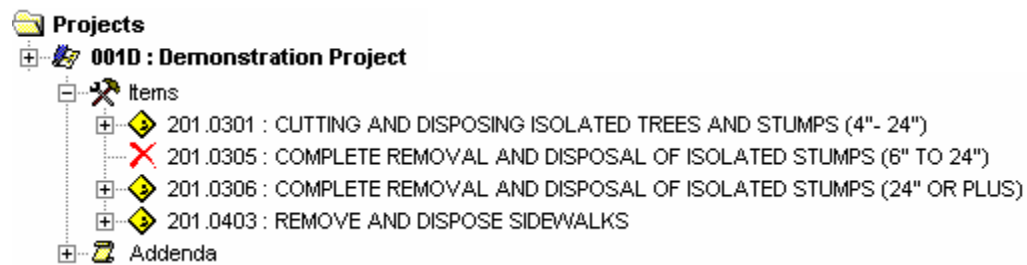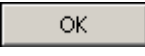
5.4.2 With Add/Remove Items Button

1. Click on the [Add/Remove Items] button. The **Add/Remove Items** Window will appear
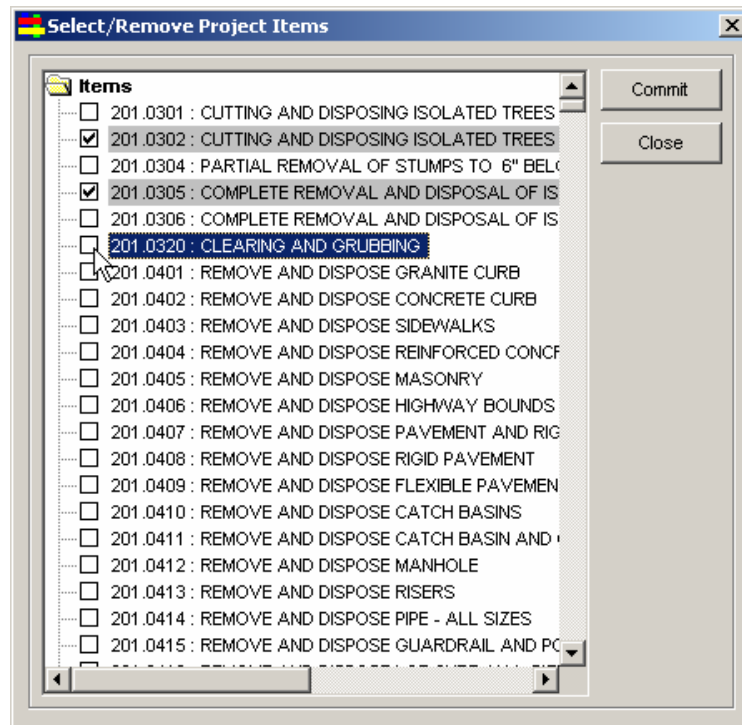
2. Uncheck the item(s) to be removed from the project.

3. Click the [Commit] button. A message box will appear

4. Click the [OK] button.

5. Click the [Close] button.

NOTE: If this is done in an addendum, the items will appear:

6. Funding Sources

6.1 View Funding Sources

1. There are two (2) methods to use to view funding sources into Quest Professional for a project.

6.1.1 Project Detail Tab

1. Select on Project Detail tab.
2. In the toolbar click on Tree, Organize Tree view, and then by Pay Code.
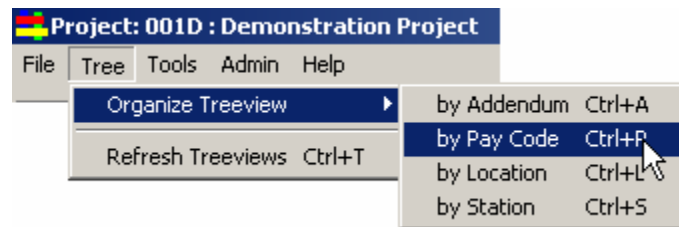
3. Click on the ⊞ sign to the left of the project name
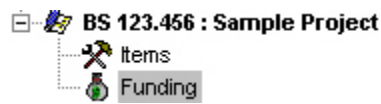
4. Click once on the Funding icon displayed below the project name. The project funding sources screen will display to the right side of the screen.

6.1.2 Project Detail Tab

1. On the My Projects Tab [My Projects] , click on the plus sign to the left of the project.
2. Click on the Funding node [Funding] listed below the project. On the right side of the screen the funding sources screen will display.
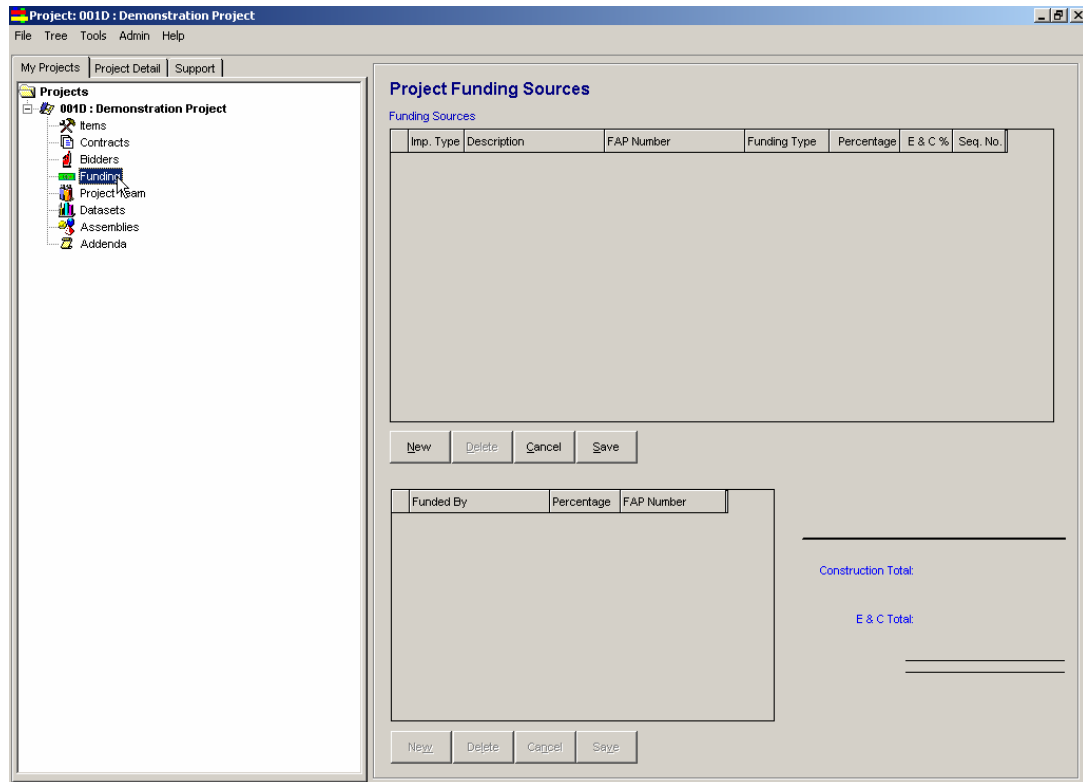
6.2 Add Funding Sources

1. Click the [New] button. A blank row will appear.

2. Click on the ▼ button or use the Alt Key and the Down Arrow Key to display possible Improvement Types. Select the Improvement Type.

Project Funding Sources

Funding Sources

Imp. Type	Description	FAP Number	Funding Type	Percentage	E & C %	Seq. No.
0001 ▼	NEW CONSTRUCTION ROA			0.00	0.00	0

0001	NEW CONSTRUCTION ROADWAY
0003	RECONSTRUCTION, ADDED CAPACITY
0004	RECONSTRUCTION, NO ADDED CAPACITY
0005	4R MAINTENANCE RESURFACING
0006	4R MAINTENACE RESTORATION & REHABILITATION

[New] [Delete] [Cancel] [Save]

3. Press the Enter Key to move to the FAP Number cell.
4. Type in the FAP Number

Project Funding Sources

Funding Sources

Imp. Type	Description	FAP Number	Funding Type	Percentage	E & C %	Seq. No.
0001	NEW CONSTRUCTION ROA	123		0.00	0.00	0

a. If the FAP Number already exists in the project click on the ▼ button or press the Alt Key and the Down Arrow Key to select the FAP Number.

5. Press the Enter Key to move to the Funding Type cell.
6. Click on the ▾ button or press the Alt Key and the Down Arrow Key to display the funding types available. Select the appropriate funding type.

7. Press the Enter Key to move to the Percentage cell.
8. Type the percentage for the funding type to cover for the Improvement Type and FAP Number combination.
9. Press the Enter Key to move to the E&C % Cell
10. Type in the E&C % Cell if applicable.
    a. Some Improvement Types cannot have an E&C% Value and user is not allowed to enter a value here.
11. Press the Enter key to save the E&C Percentage value.
12. Once the percentages total to 100 for the Improvement Type and FAP Number combination, click the ⬚Save⬚ button. This will save the funding information to the project.
13. If receive the following message, click the ⬚ OK ⬚ button.
    (The Pay Code and FAP Number specified percentage values do not equal 100%)
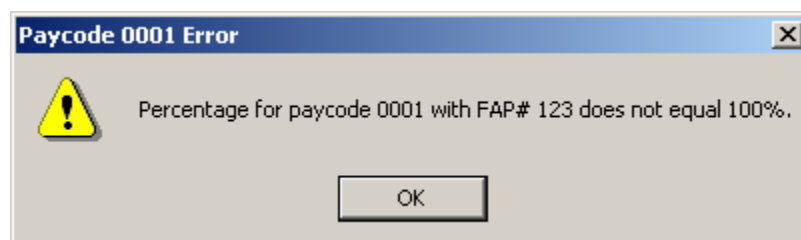
14. The following message will then appear:

Save Valid Paycode Information

There are errors with some of the entered Paycodes.
Click OK to save the valid data, Cancel to abort the save operation alltogether.
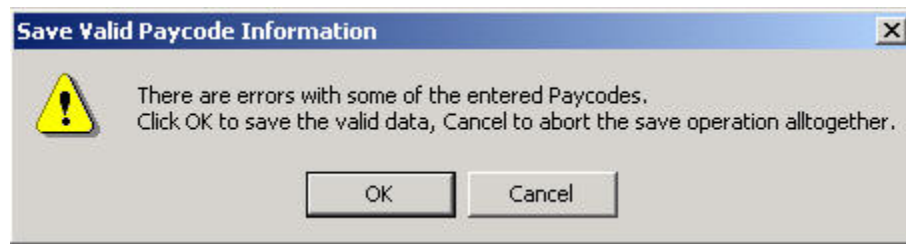
OK   Cancel

15. Press the button most applicable:
    a. OK Button will allow the program to save the funding information that is valid.
    b. Cancel Button will cancel saving and allow user to change the percentage value(s) for the Improvement Type and FAP Number combination (will be highlighted in red) that are not correct.
16. If there is sub-funding to be entered for the Funding Type Other for a Improvement Type and FAP Number combination:
    a. Click on the row with the Funding Type "Other"

Project Funding Sources

Funding Sources

Imp. Type	Description	FAP Number	Funding Type	Percentage	E & C %	Seq. No.
0001	NEW CONSTRUCTION ROA	123	OTHER	50.00	0.00	02
0001	NEW CONSTRUCTION ROA	123	FEDERAL	50.00	0.00	02

New   Delete   Cancel   Save

Funded By	Percentage	FAP Number
	0.00	123

OTHER/ Total: $0.00

Construction Total: $0.00

E & C Total: $0.00

0001/123/ Total: $0.00

New   Delete   Cancel   Save

    b. Click the ⟨New⟩ button. A blank row will appear.
    c. Type the Funded By Source.

d. Press the Enter Key to move to the Percentage Value or click the mouse pointer into the Percentage Value Cell.
e. Type the Percentage Value for the Funded By Source.
f. Press the Enter Key to move to the FAP Number cell or click the mouse pointer into the FAP Number cell.
g. Type the FAP Number for the Funded By Source.
h. Click the New button to enter a new row.
i. Once the percentages total 100, click the [Save] button to save this information to the project.
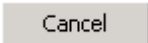
NOTE: User Must Save the Funding Sources to the project first before entering Sub-funding Sources.

If everything is correct, a message will appear stating the change will cascade through all item's Locations and Stations.
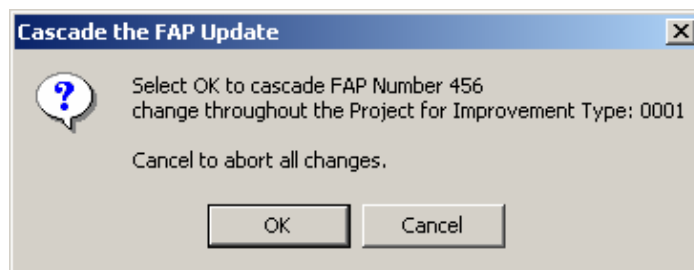
Click [OK] to proceed.

OR

Click [Cancel] to return to the funding screen

a. Funding changes will not cascade.
b. Funding changes will not be saved to the project.

6.3 Edit Funding Source

Changes can be made to the funding types at any time.
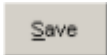
1. Click on any funding information to highlight the cell and make necessary changes.

2. After all corrections have been made click the [Save] button.

   a. If a change has been made to a FAP Number a message will appear noting all the changes will be cascaded throughout the entire Improvement Type.

3. Click the [OK] button.
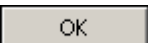
6.3.1 Funding Source Error

If an Improvement Type's funding is not totally accounted for, i.e. percentage is not 100. A message, similar to the one below, will appear.
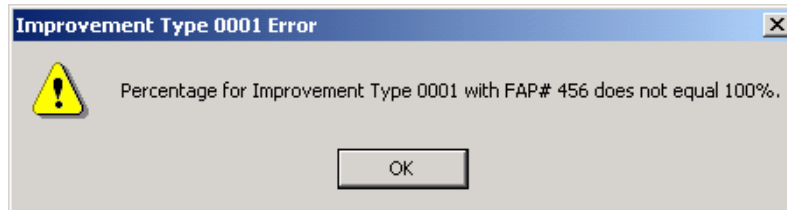
1. Click the OK button. The following message will appear.
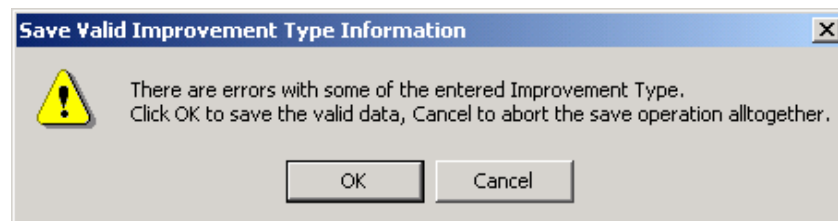
2. Click the OK button. The changes made to the incorrect Improvement Type will be deleted and the original data will be restored.

   NOTE: Only fully funded Improvement Types, where the percent total is 100, can be saved.

6.4 Delete a Funding Source

1. Click on a cell in the row to be deleted.
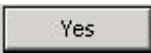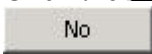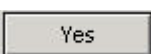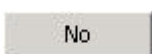
2. Click the ⬚Delete button. A Message box will appear confirming that the funding and any sub-funding associated with this row will be deleted upon request.
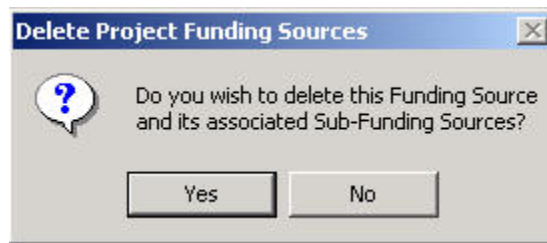
3. Click the ⬚Yes button if this funding row should be deleted. Click the ⬚No button to cancel the deletion.
4. If the Yes Button was clicked, the following message will appear:
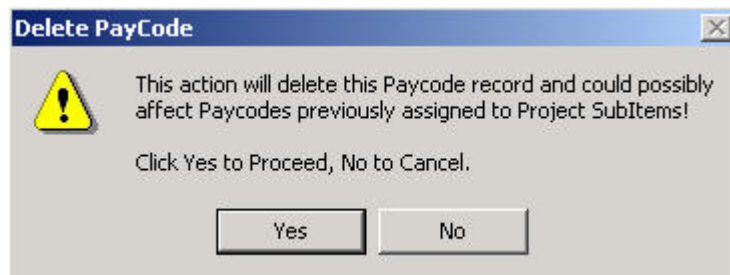
5. Click the ⬚Yes button to proceed with the deletion. Click the ⬚No button to cancel the deletion.
6. Refer to the rules section (Page 49) on funding for how items, locations, and stations are affected when funding is deleted.

7. Locations and Stations

7.1 To view Locations and Stations

1. Select the [Project Detail] Tab

2. Click on the plus sign left of the project

3. Click on the plus sign left of 'Items' and all items for the project will be listed.
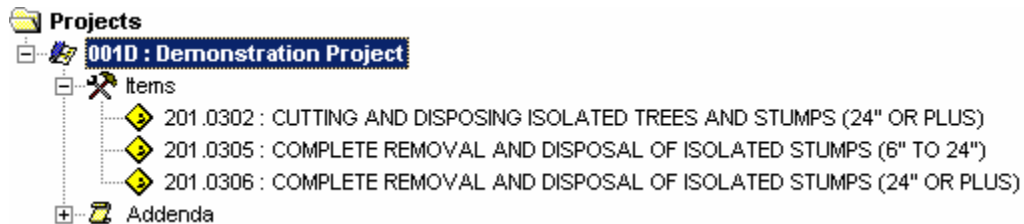
4. To view Locations:

   a. Click on the plus sign to the left of an Item. The Locations will appear listed below.
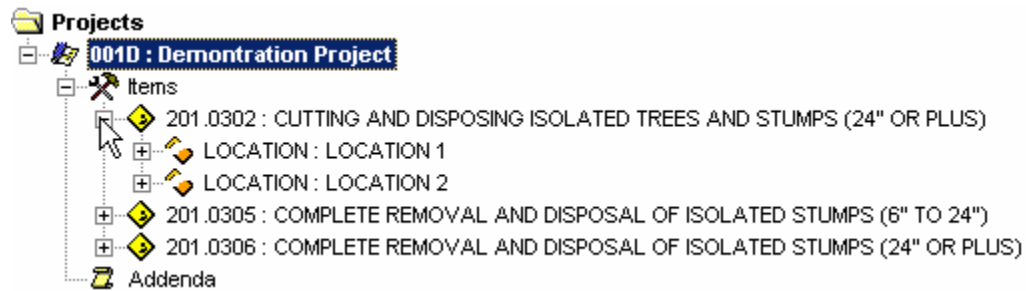
OR

   b. Click on the Item and all the Locations will be displayed in the Location grid to the left of the Projects Treeview.
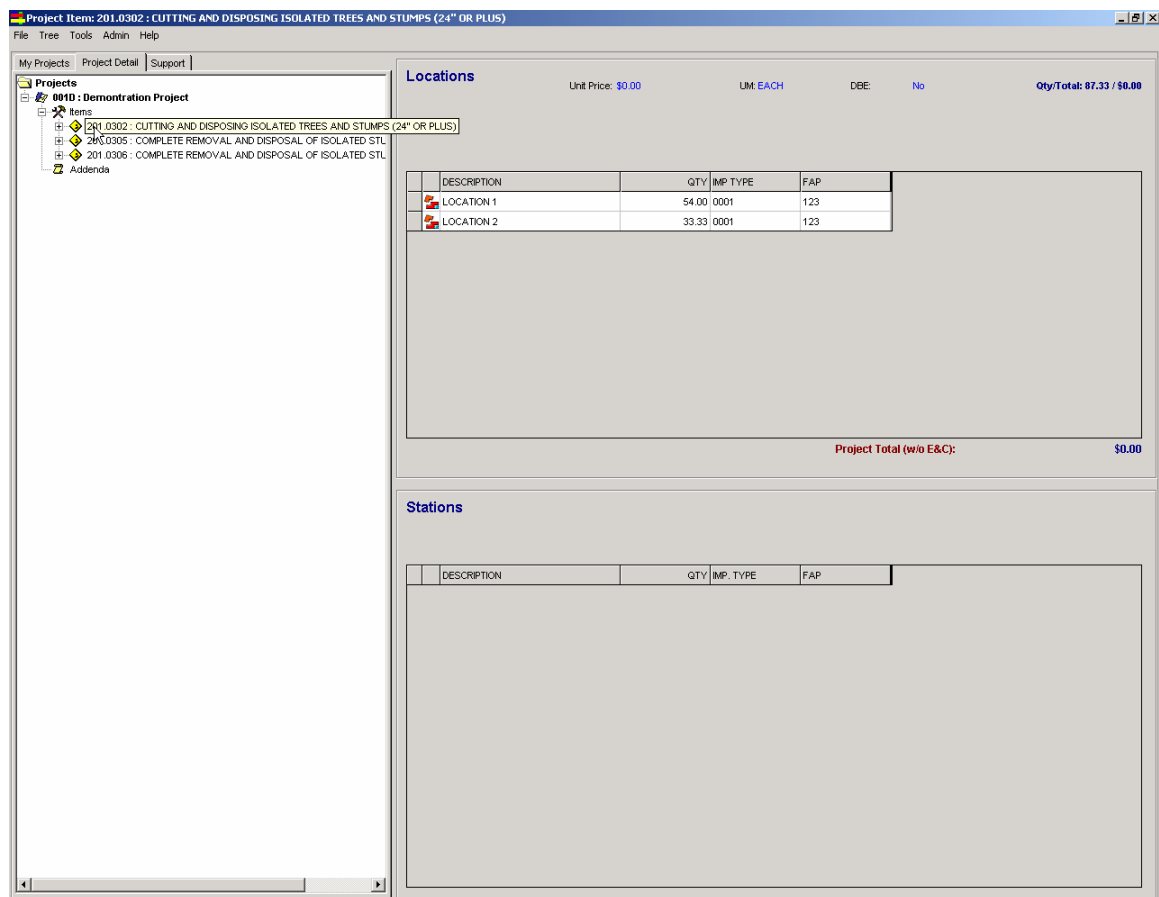
5. To view Stations:

    a. Click on the plus sign to the left of a Location. The Stations will appear listed below.
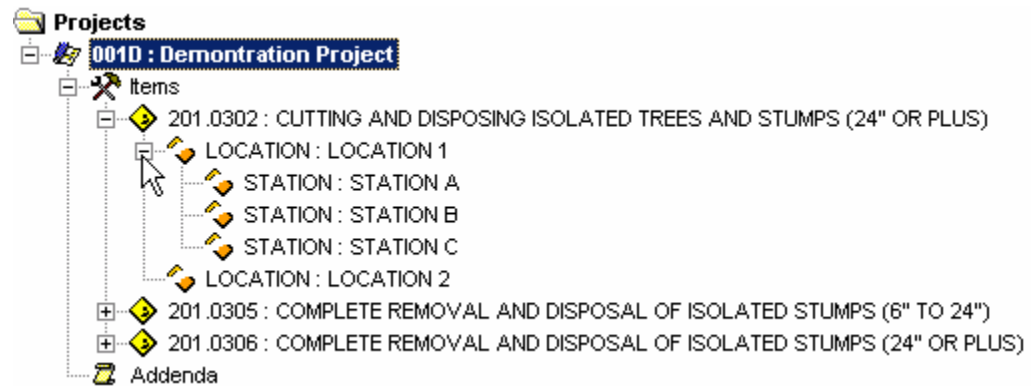
OR

    b. Click on a Location in the Location grid, all of the Location's Stations will be listed below in the Station grid.

7.2 Add Location to item without locations

1. To add a location, if none exist, click on the appropriate item in the tree view. A
   cursor will appear in the first row in the locations grid for the user to enter the
   description field.

2. To save the location, user may press the Enter Key or the Right Arrow Key on the
   keyboard.

3. If the location has no stations, enter in a quantity in the QTY box and hit the right
   arrow key.

4. A list of Improvement Types may be viewed by either clicking on the ![arrow] arrow in the IMP. TYPE box or use the alt-down arrow key combination when there is focus in the IMP. TYPE box.

5. Select the desired Improvement Type.
6. Select the desired FAP Number:
   a. Once the Improvement Type has been selected, if there is only one corresponding FAP Number for the Improvement Type, the FAP field will be automatically filled.
   b. If there is more then one corresponding FAP number for the selected pay code, the user will be allowed to select the correct FAP number from a drop down box.

7. If at any time, the user would like to cancel out of adding the location, click on the icon to the left of the location being added and press the Delete key on the keyboard. There will not be a message. The location will be removed.

7.3 Add location to item with locations

1. Click on the 🧩 icon to the left of the last location description for the item.

2. Using the keyboard, press the Alt key and the Down Arrow key at the same time. A blank row will appear below the last location. A cursor will appear in the description field of the blank row.

3. Type in the location description with the keyboard.
   NOTE: The location description must be unique for the item. If a duplicate location description is entered for an item, the following message will appear when the attempt is made to save the description:
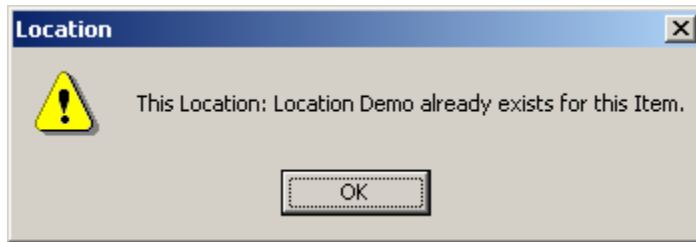
"Location Demo" was the duplicate location description entered.

4. Press the Enter Key or the Right Arrow Key to save the Location's description. The focus will then move to the Quantity field.
5. Type in the Quantity or leave at 0.
   a. If the location will have stations, the location's quantity will recalculate with the sum of the station quantities for that location.
6. Press the Enter Key or the Right Arrow Key to save the quantity value.
7. The focus will move to the Improvement Type Field
   a. If the item has a default Improvement Type value, the Improvement Type for the location will automatically populate with the default Improvement Type. This value can be changed for the location.

8. To view the list of the project's Improvement Types, click on the down arrow in the field or press the Alt Button and the Down Arrow Button at the same time. Select the desired Improvement Type.

9. Press the Enter Key or the Down Arrow Key to save the Improvement Type information to the Location. The focus will move to the FAP Number field.
10. Select the desired FAP Number:
    a. Once the Improvement Type has been selected, if there is only one corresponding FAP Number for the Improvement Type, the FAP field will be automatically filled.
    b. If there is more then one corresponding FAP number for the selected pay code, the user will be allowed to select the correct FAP number from a drop down box.

11. If at any time, the user would like to cancel out of adding the location, select on the icon to the left of the location being added and press the Delete key. There will not be a message. The location will be removed.

7.4 Edit Existing Location

1. Click on the item that contains the location to be edited. The locations for the specified item will be displayed to the right of the tree view.
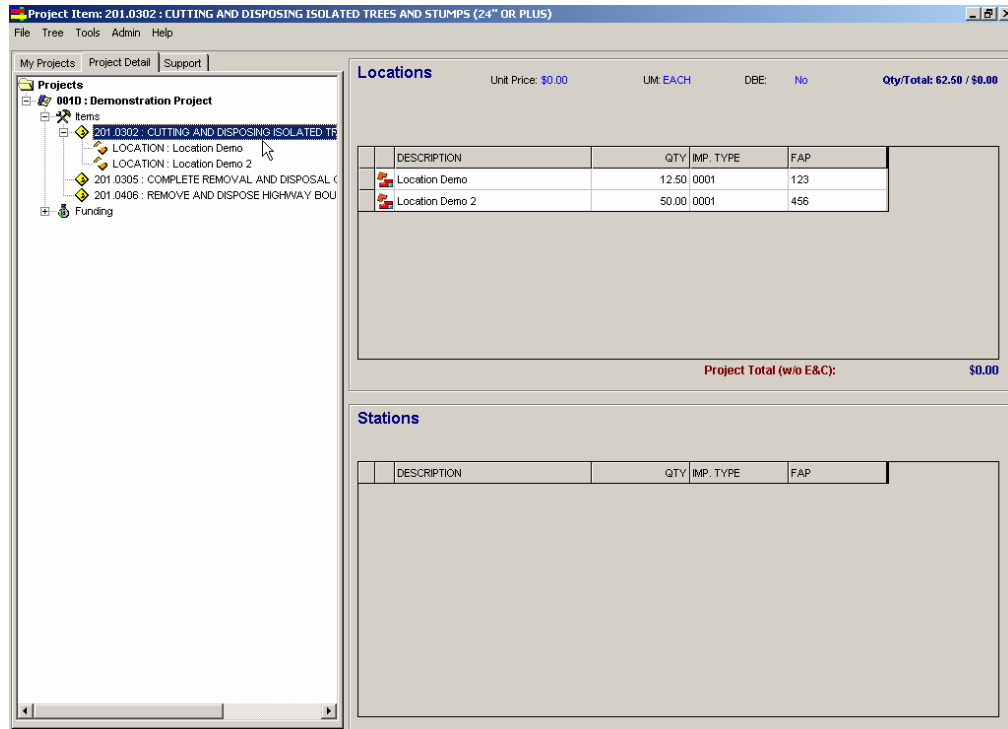
2. Select the field for the location that needs to be edited. If the location does not have any stations, any value for the location can be changed. If the location does have stations, only the location's description field can be edited.
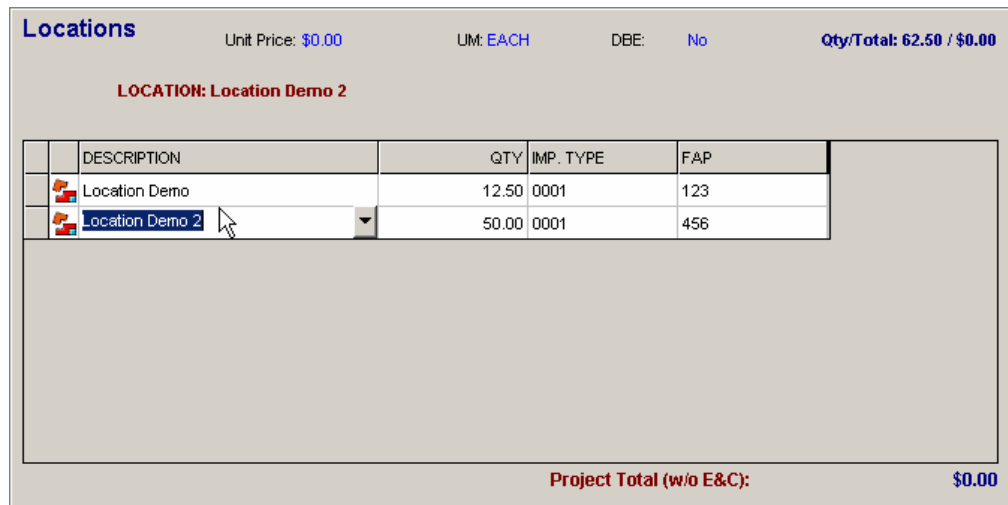
3. After changing the information in the field, press the Enter key or the Right Arrow key to save the information.

7.5 Delete existing location

NOTE: If a Location is part of an Assembly, the Location must be deleted through the Assembly

1. Click on the item that contains the location to be deleted. The locations for the specified item will be displayed to the right of the tree view.
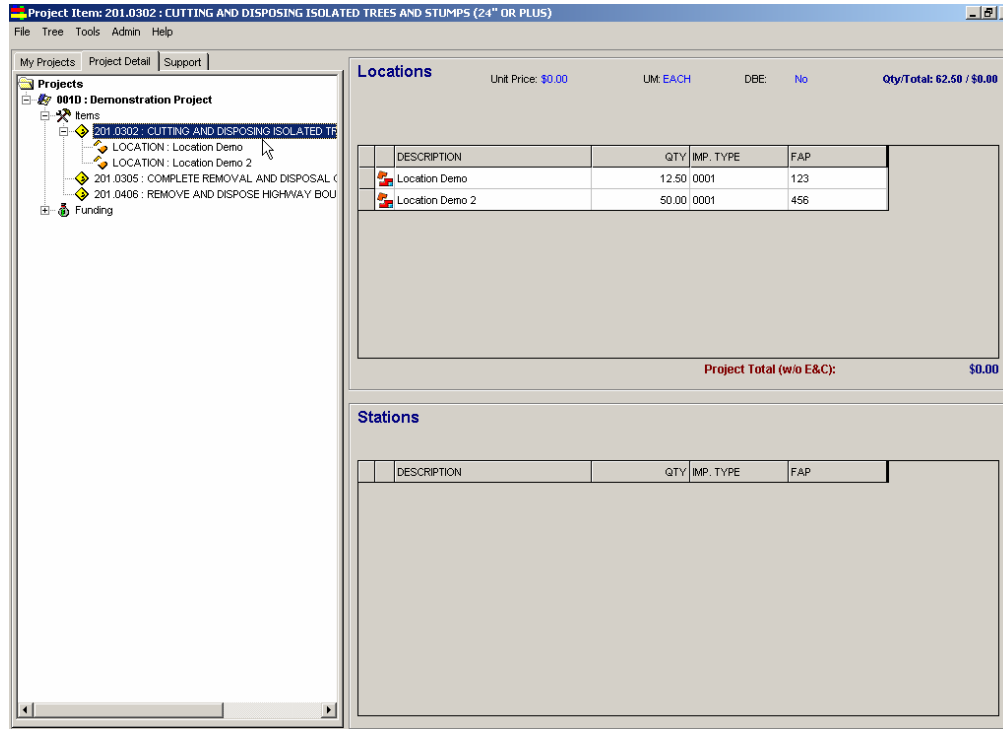
2. Click on the ![icon] icon to the left of the location you want to delete.
3. Press the Delete key on the keyboard. A message box will appear to confirm the location (Sub-Item) and its corresponding stations (associated Sub-Items) are to be deleted.
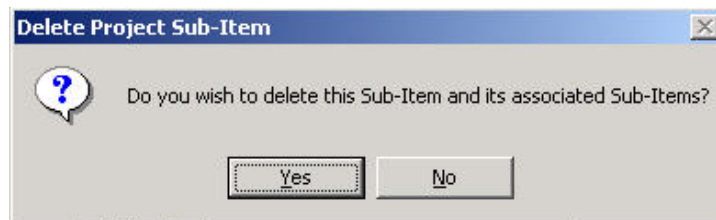
4. Click the ![Yes] button to delete the location and its associated stations.
    a. The row for that location will be removed from the grid
    b. The rows for all associated stations for the newly deleted location will be removed from the grid
    c. The item quantity will be recalculated based on the remaining locations and stations that exist for the item.

7.6 Add Station to Location without Station(s)

1. Select the location to add a station to by clicking on that locations DESCRIPTION. An empty row will appear in the Station Grid with the cursor in the description field.

2. Type in the station description with the keyboard.
   NOTE: The station description must be unique for the item. If a duplicate location description is entered for an item, the following message will appear when the attempt is made to save the description:

   "Station Demo" was the duplicate location description entered.
3. Press the Enter Key or the Right Arrow Key to save the Station's description. The focus will then move to the Quantity field.

4. Type in the Quantity or leave at 0.
5. Press the Enter Key or the Right Arrow Key to save the quantity value. The focus will move to the Improvement Type Field.
   a. If the item has a default Improvement Type value, the Improvement Type for the location will automatically populate with the default Improvement Type. This value can be changed for the location.
6. To view the list of the project's Improvement Types, click on the down arrow in the field or press the Alt Button and the Down Arrow Button at the same time. Select the desired Improvement Type.

7. Press the Enter Key or the Down Arrow Key to save the Improvement Type information to the Location. The focus will move to the FAP Number field.
8. Select the desired FAP Number:
   a. Once the Improvement Type has been selected, if there is only one corresponding FAP Number for the Improvement Type, the FAP field will be automatically filled.
   b. If there is more then one corresponding FAP number for the selected pay code, the user will be allowed to select the correct FAP number from a drop down box.

9. If at any time, the user would like to cancel out of adding the station, select on the icon to the left of the location being added and press the Delete key. There will not be a message. The station will be removed.

7.7 Add Station to Location with Station(s)

1. Select any field for the appropriate Location in the grid.
2. The associated stations will appear in the Stations Grid below.

3. Click on the ![icon] icon to the left of the last station row.
4. Press the Alt Key and the Down Arrow Key on the keyboard at the same time. A new empty row will appear below.

4. Type in the station description with the keyboard.

   NOTE: The station description must be unique for the item. If a duplicate location description is entered for an item, the following message will appear when the attempt is made to save the description:

   "Station Demo" was the duplicate location description entered.

5. Press the Enter Key or the Right Arrow Key to save the Station's description. The focus will then move to the Quantity field.
6. Type in the Quantity or leave at 0.
7. Press the Enter key or the Right Arrow key to save the quantity value.
8. The focus will move to the Improvement Type Field
   a.   If the item has a default Improvement Type value, the Improvement Type for the location will automatically populate with the default Improvement Type. This value can be changed for the location.
9. To view the list of the project's Pay Codes, click on the down arrow in the field or press the Alt Button and the Down Arrow Button at the same time. Select the desired Improvement Type.
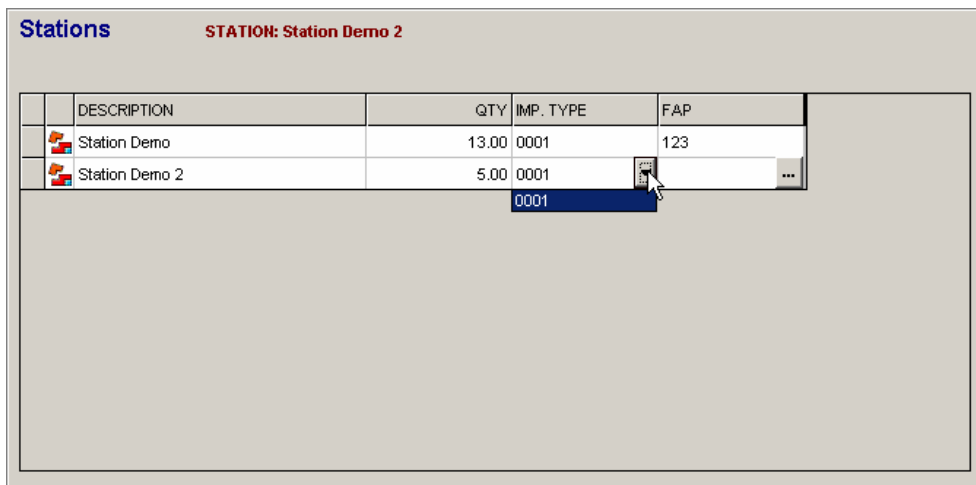
10. Press the Enter Key or the Right Arrow Key to save the Improvement Type information to the Location. The focus will move to the FAP Number field.

11. Select the desired FAP Number:
    a. Once the Improvement Type has been selected, if there is only one corresponding FAP Number for the Improvement Type, the FAP field will be automatically filled.
    b. If there is more then one corresponding FAP number for the selected pay code, the user will be allowed to select the correct FAP number from a drop down box.

12. If at any time, the user would like to cancel out of adding the station, select on the icon to the left of the location being added and press the Delete key. There will not be a message. The station will be removed.

7.8 Edit existing station

1. Click on the item that contains the station to be edited. The locations for the specified item will be displayed to the right of the tree view.
2. Click on the location that contains the station that requires editing. The stations will be listed below.
3. Select the field for the station that needs to be edited.

4. After changing the information in the field, press the Enter key or the Right Arrow button to save the information.

7.9 Delete existing station

1. Click on the item that contains the station to be edited. The locations for the specified item will be displayed to the right of the tree view.
2. Click on the location that contains the station that you want to delete. The stations will be listed below.
3. Click the 🔧 icon to of the station you want to delete.

Stations   STATION: Station Demo 2

	DESCRIPTION	QTY	IMP. TYPE	FAP
🔧	Station Demo	13.00	0001	123
🔧	Station Demo 2	5.00	0001	123

4. Press the Delete key.
5. A message box appears asking if the station should be deleted.
6. Select the [Yes] button

Delete Project Sub-Item   ✕

❓ Do you wish to delete this Sub-Item and its associated Sub-Items?

[Yes]   [No]
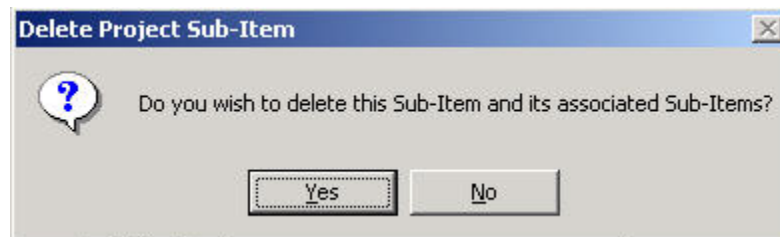
   a. The row for that station will be deleted
   b. The associated Location's Quantity will be recalculated
   c. The associated Item's Quantity will be recalculated.
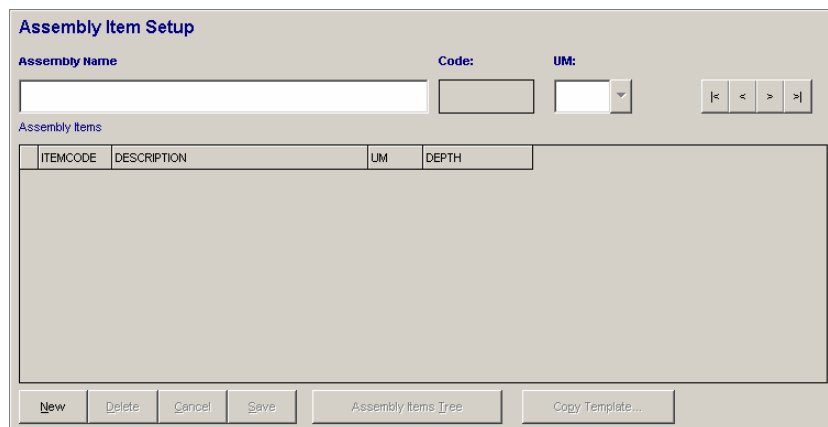
8. Assemblies

8.1 Create an Assembly
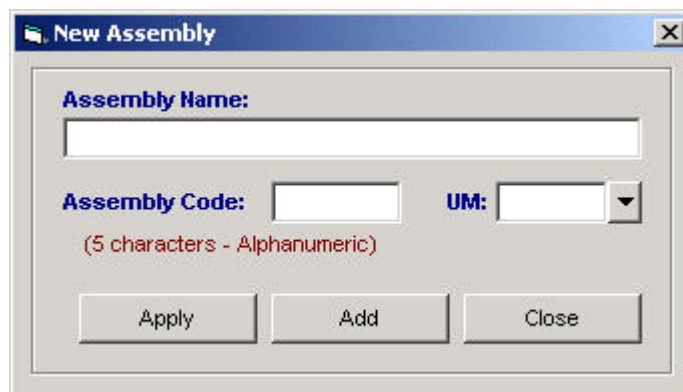
1. Under the My Projects tab ⬚My Projects click on the ⊞ sign to the left of the project.

2. Select the 🎈 Assemblies node. The Assembly Item Setup menu appears on to the right of the screen.
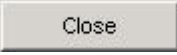
3. Select the ⬚New button. The Assembly Setup Screen will appear.
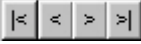
4. Enter the Assembly Name

5. Enter the Assembly Code consisting of 5 alphanumeric characters (Numbers and/or Letters only). The Assembly Code can not be changed after it has been entered.

6. Select the Unit of Measure from the drop down menu provided

7. Select the Apply button.

8. A message appears stating the assembly was successfully added.
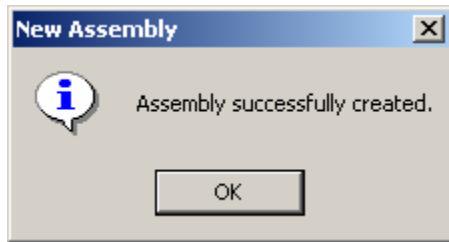
9. To add another assembly, select the New button and repeat steps 4-7.

10. When completed, select the Close button.

Note: If there is more then one assembly for a project, use the keys to access the different assemblies in the following manner.

Access first assembly

Access previous assembly

Access following assembly

Access last assembly
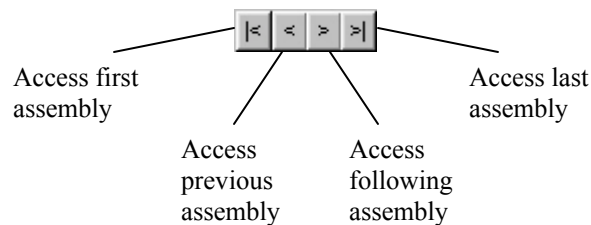
8.2 Add Items to an Assembly

1. To assign items to the assembly select the [Assembly Items Tree] button. The **Select/Remove Assembly Items** menu appears.
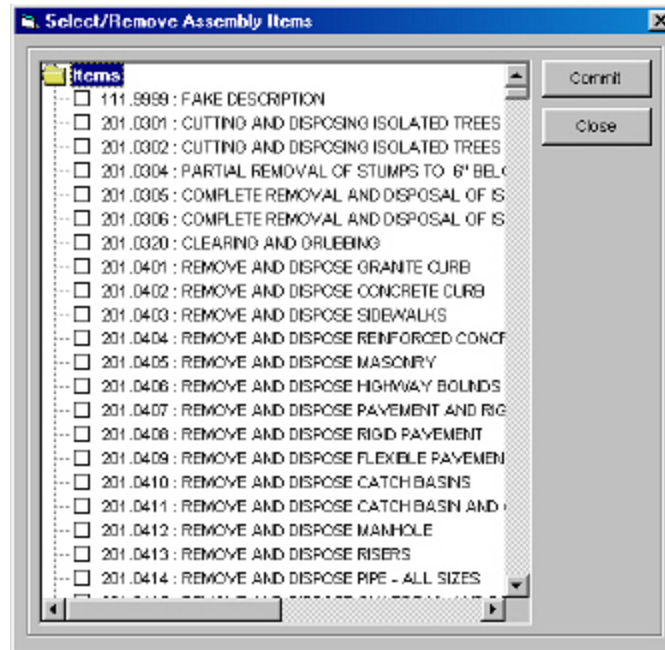
2. Click once in the ☐ box to the left of each item to be added to the assembly. The box will now appear checked off☑.

3. When all items have been selected select the [Commit] button. A message box will appear stating that all items have been successfully added.
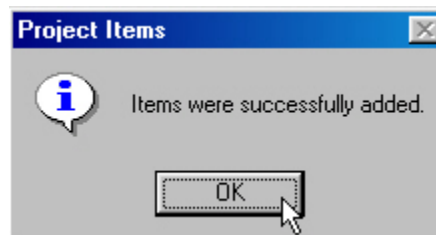
4. Select the [OK] button.

5. Select the [Close] button on the **Select/Remove Assembly Items** menu.

8.3 Add Depth to Assembly Item

1. Select the Depth field for the assembly item.

ITEMCODE	DESCRIPTION	UM	DEPTH	FACTOR
201.0304	PARTIAL REMOVAL OF STUMPS TO 6" BELOW	EACH	0.00	0.00000
201.0306	COMPLETE REMOVAL AND DISPOSAL OF ISOL	EACH	0.00	0.00000
201.0402	REMOVE AND DISPOSE CONCRETE CURB	LF	0.00	0.00000
201.0405	REMOVE AND DISPOSE MASONRY	CY	0.00	0.00000
201.0407	REMOVE AND DISPOSE PAVEMENT AND RIGID	SY	0.00	0.00000
201.0410	REMOVE AND DISPOSE CATCH BASINS	EACH	0.00	0.00000

2. Enter the depth value for the item
3. Use the enter key on the keyboard to save the depth value to the assembly item.
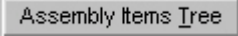
8.4 Add Factor to Assembly Item

1. Select the Factor Field for the Assembly Item.

ITEMCODE	DESCRIPTION	UM	DEPTH	FACTOR
201.0304	PARTIAL REMOVAL OF STUMPS TO 6" BELOW	EACH	0.45	0.00000
201.0306	COMPLETE REMOVAL AND DISPOSAL OF ISOL	EACH	0.00	0.00000
201.0402	REMOVE AND DISPOSE CONCRETE CURB	LF	0.00	0.00000
201.0405	REMOVE AND DISPOSE MASONRY	CY	0.00	0.00000
201.0407	REMOVE AND DISPOSE PAVEMENT AND RIGID	SY	0.00	0.00000
201.0410	REMOVE AND DISPOSE CATCH BASINS	EACH	0.00	0.00000

2. Enter the Factor Value for the Assembly Item.
3. Use the Enter key to save the factor value for the Assembly Item.
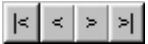
8.5 Remove Item from Assembly

1. Select the ⬚Assembly Items Tree button.
2. In the Select/Remove Project Assembly Items menu click on the ☑ box of the item to be removed from the assembly. The box will now appear un-checked,☐.

3. When all items to be removed have been un-checked select the ⬚Commit button. A message box will appear stating that all items have been successfully added.

4. Select the ⬚OK button.

5. Select the ⬚Close button on the **Select/Remove Assembly Items** menu.
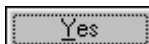
8.6 Delete Assembly

1. If there is more then one assembly for a project, use the [|< < > >|] keys to find the assembly to be removed.

Access first assembly
Access previous assembly
Access next assembly
Access last assembly
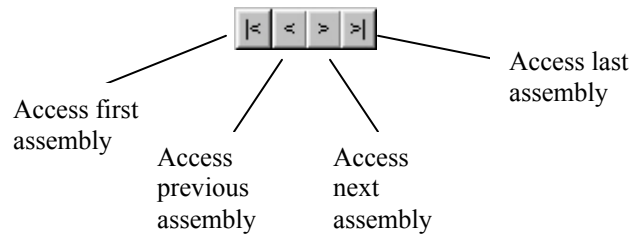
2. Once the desired assembly is displayed, select the [Delete] button. A message box will appear confirming the Assembly should be removed from the project.
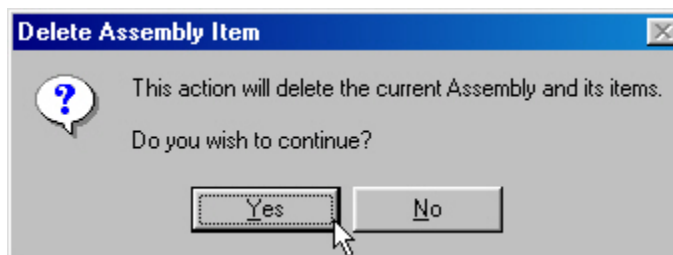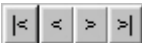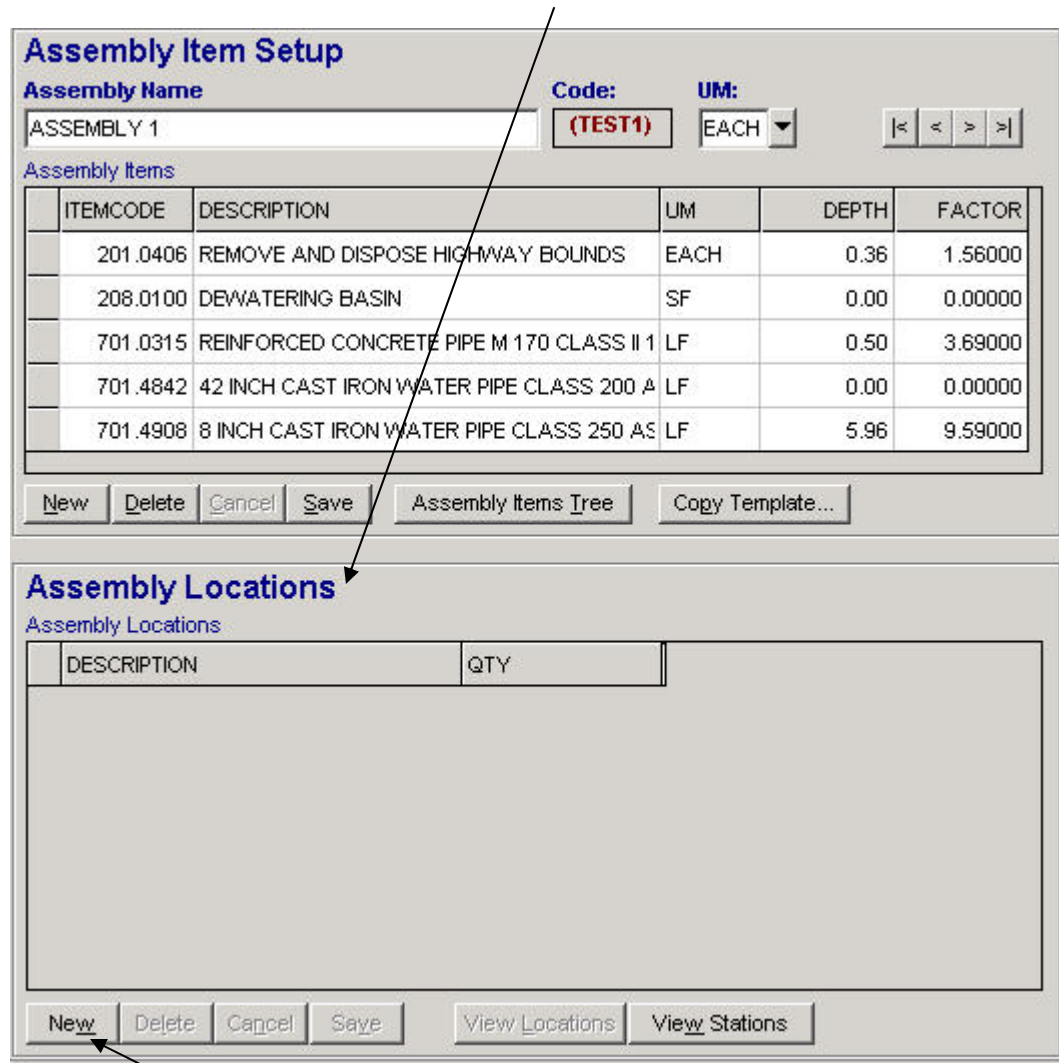
Delete Assembly Item

? This action will delete the current Assembly and its items.

Do you wish to continue?

Yes   No

3. Select the [Yes] button. A message box will appear confirming the assembly will be removed from the project.

Assembly Setup

i Assembly successfully deleted.

OK
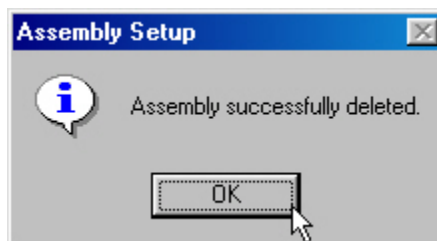
4. Select the [OK] button.

8.7 Add Assembly Location

1. Select the assembly using the |< < > >| buttons. The Assembly Location menu is located below the Assembly Item Setup menu.

2. Select the New button. An empty row appears under the DESCRIPTION and QTY columns. Enter the proper information here.
3. Select the Save button. A message box will appear confirming the location has been added to the assembly.
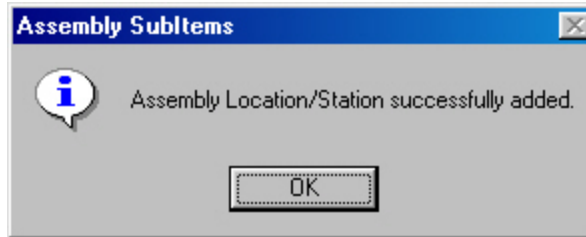
4. Select the OK button.

8.8 Add Station to Assembly Location

1. Select the assembly using the |< < > >| buttons.

2. Select the location to contain the new station.
3. Select the View Stations button. The Assembly Stations Screen will appear below the Assembly Item Setup Screen.

4

Assembly Item Setup

Assembly Name   Code: UM:

ASSEMBLY 2   (TEST2)   ACRE |< < > >|

Assembly Items

ITEMCODE	DESCRIPTION	UM	DEPTH	FACTOR
201.0406	REMOVE AND DISPOSE HIGHWAY BOUNDS	EACH	0.00	0.00000
701.2072	72" BCCMCP M190 TYPE A W/BENDS AND BAN	LF	5.50	99.56000
819.0900	DRILL & SET CONCRETE EXPANSION ANCHOR!	EACH	0.00	0.00000
824.0122	AASHTO M270 GRADE 36 STEEL FURNISH FAE	LBS	8.80	5.00000

New Delete Cancel Save   Assembly Items Tree   Copy Template...

Assembly Stations

Assembly Stations
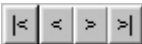
DESCRIPTION	QTY

New Delete Cancel Save   View Locations View Stations

4.   Select the [New] button. An empty row will appear for the new station.

5. Enter the station description and the station's quantity

6. Select the [Save] button. A message box will appear confirming the station has been successfully added.
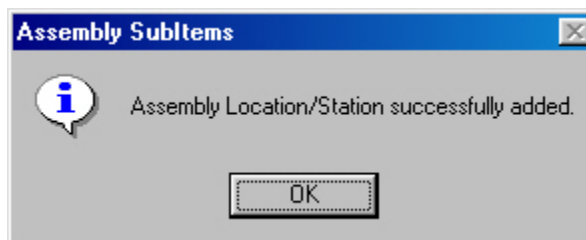
7. Select the [OK] button.

8. To add another station to the same location for the assembly, repeat steps 3-6.

9. To return to the location table, select the [View Locations] button.

NOTE: The assembly code will appear after the location/station description in the Project Details tree view and in the DOQ Report for the assembly items as shown below.
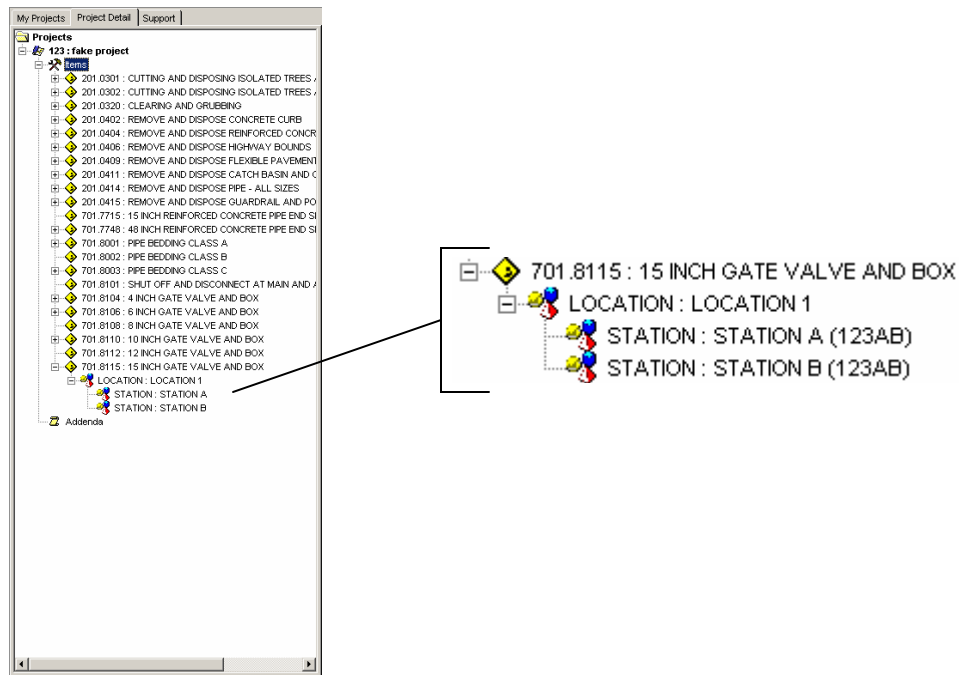
9. Project Team
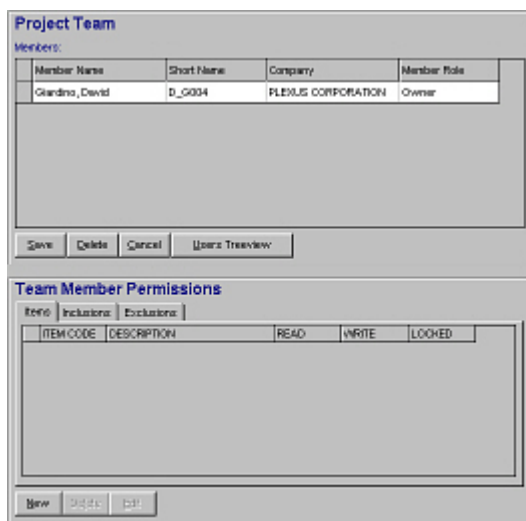
9.1 Add User to Project Team

NOTE: To enforce the permissions correctly on the specific user's machine, make sure the user has been added to Quest Professional thorough the Admin Screen first. To do this, please follow the instructions on C. How To…/Admin Screen-Add a New User, pg. 99.

1. Click on the 👥 Project Team node in the project menu.
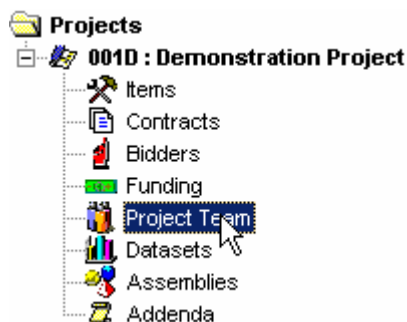
2. Two sections appear on the right side of the screen labeled Project Team and Team Member Permissions.

3. Under the Project Team heading resides the Members table. One name has already been added to the table. This is the person who was entered as the project owner while creating the project.
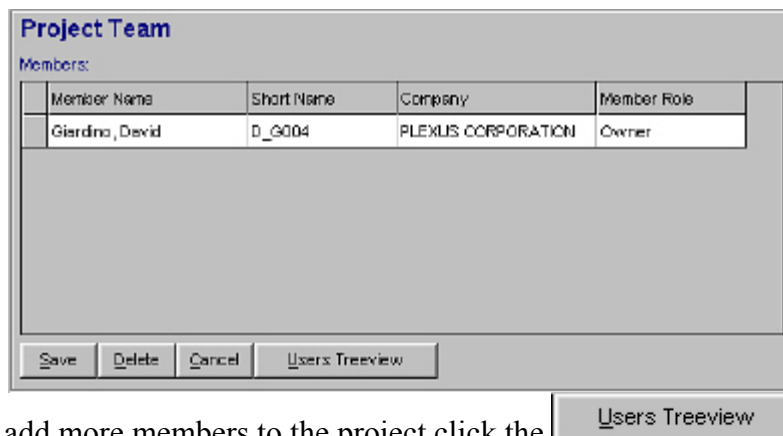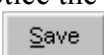
4. To add more members to the project click the [Users Treeview] button.
5. The Add/Remove Project Team Members menu appears.
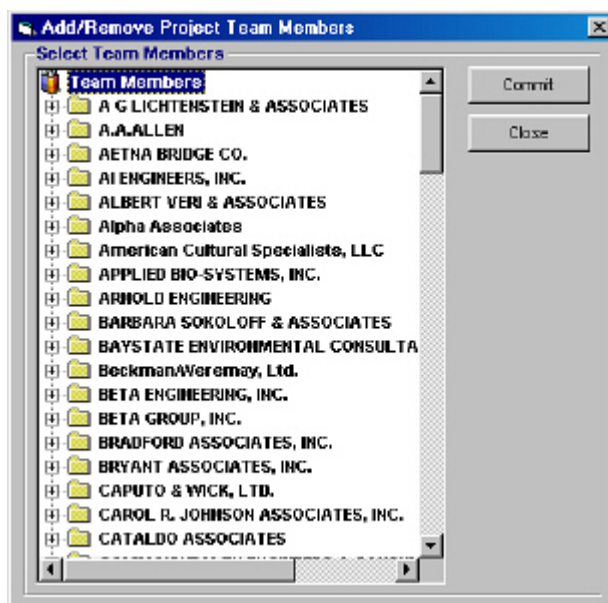
6. Click on the ⊞ sign to the left of the user's company.
7. Click in the empty box to the left of the desired team member, placing a checkmark in the box.
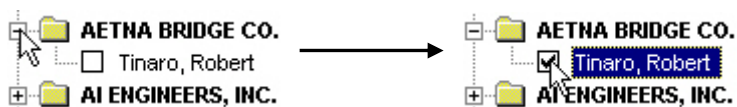
8. Continue this procedure until all necessary members have been added. Click the [Commit] button.

9. Click the [Close] button to close the Add/Remove Project Team Members menu. Notice the additions to the Members table.

10. Click the [Save] button.

11. Set the Permissions.
    a. Read
    b. Write
    c. Lock

9.2 Remove user from Project Team

1. Click on the ⛏ Project Team node in the project menu. The Project Team Screen will appear to the left.

2. Click once on the member's name, the name becomes highlighted in blue.

Member Name	Short Name	Company	Member Role
Giardino, David	D_G004	PLEXUS CORPORATION	Owner
Tinaro, Robert	R_T002	AETNA BRIDGE CO.	Member
Aobra, Lisa	L_A001	ALBERT VERI & ASSOCIA	Member
Berube, Greg	G_B002	BETA ENGINEERING, INC.	Member
Viveiros, Kevin	K_V002	PARE ENGINEERING CORP	Member
Stefanik, Peter	P_S002	PLEXUS CORPORATION	Member

3. Click the [Delete] button. The team member has been removed from the Project Team.

4. At any time changes have been made to the table click the [Save] button.

9.3 Edit Project Team Member Permissions

1. Click on Project Member's name in the Members table. That members Permissions will be listed below.

2.

10. Reports

10.1 Select Default Printer

It is important to set the printer that will be used to print the report as the default printer. If the report is sent to a different printer other then the default printed, text may be cut off due to a different printer's margin settings.

1. Click on the Start Button, select Settings, and then Printers.
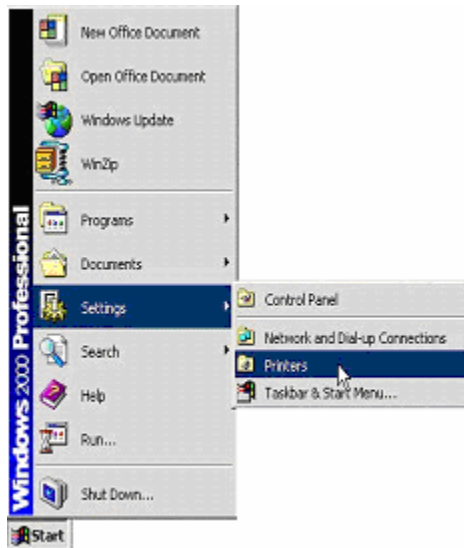
2. Right-click with the mouse on the Printer Icon. Select from the menu Set as Default Printer.
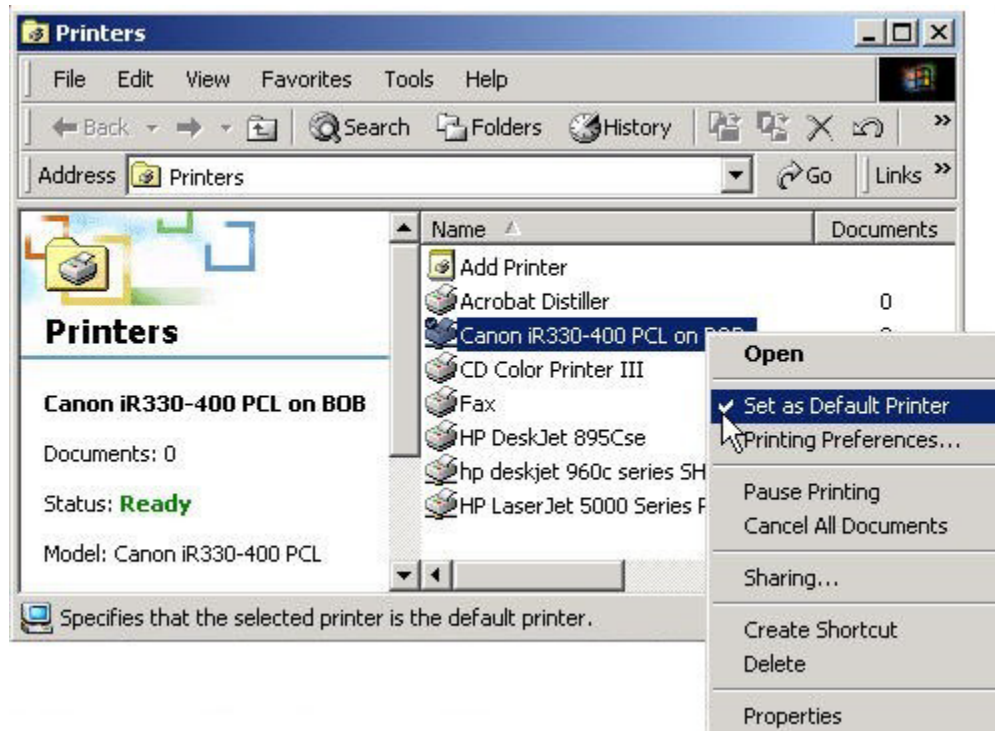
10.2 View Reports

1. In the toolbar click on Tools and select Reports. A window will appear displaying all possible reports.
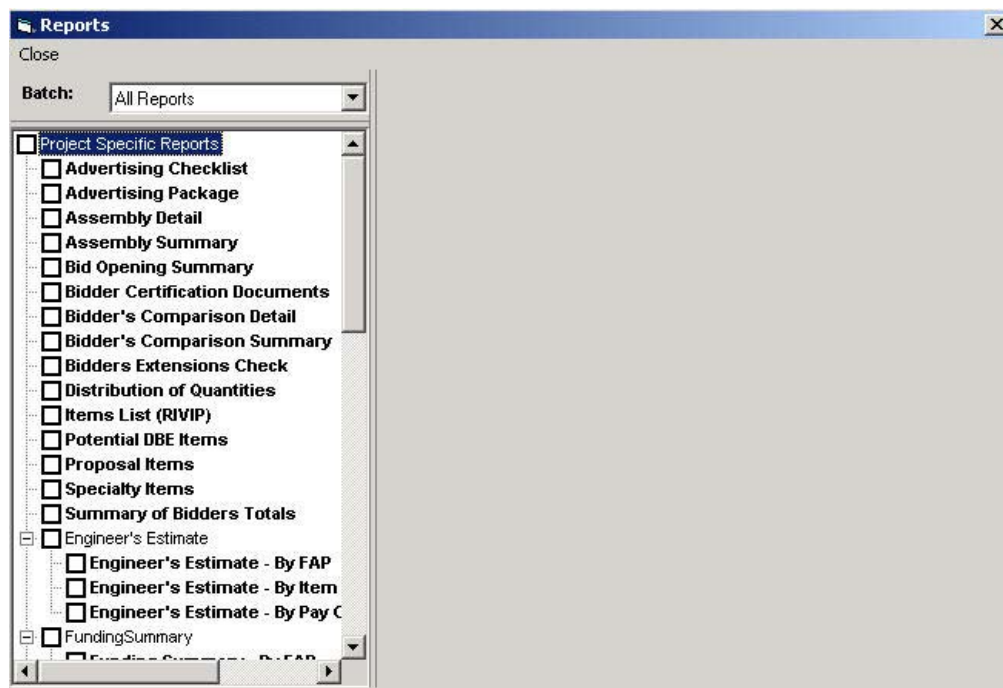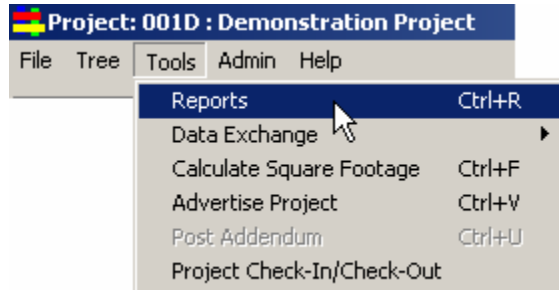
2. Place a checkmark in the box to the left of the report to be viewed. All possible parameters will display on the right side of the window for the selected report.
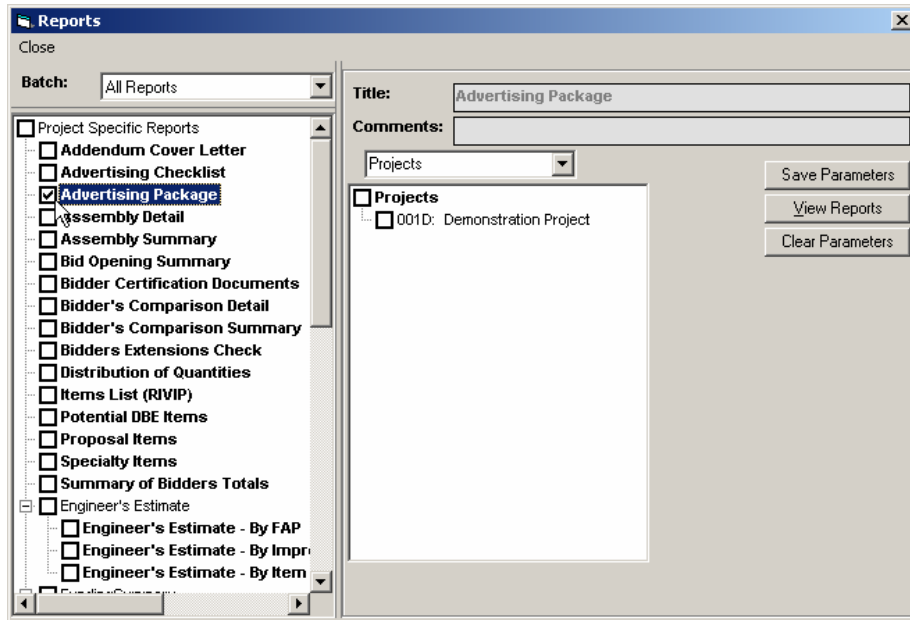
3. Select from the drop down either Projects or Contracts where applicable.
4. Place a checkmark in the box to the left of the project or contract to specify what information the report will display.

5. After the parameter(s) has been set for the report, select the ⬚ Save Parameters button

6. Select the ⬚ View Reports button. The Report will appear.

7. To print the report, select the Printer icon ![printer icon] located in the upper-left side of the screen.
8. To close the report, select the Close option on the menu.
9. Before viewing another report, select the ![Clear Parameters] button.

NOTE: Some documents offer the ability to view changes made in an addendum.
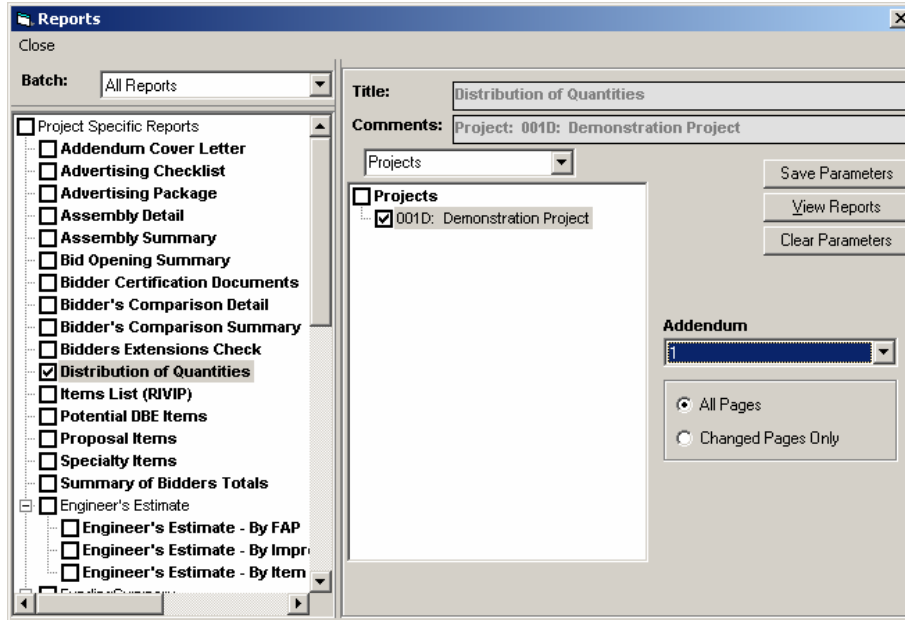
   a. Select the addendum value from the Addendum Drop Down Box if the project/contract is in an addendum
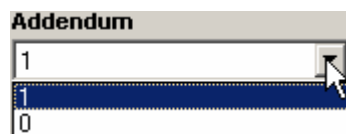
   b. Select either the option for All Pages or Changed Pages if the project/contract is in an addendum.
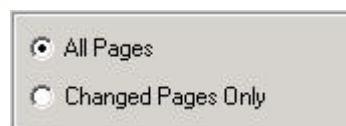
11. Import

11.1 Project File

1. Select from the menu Tools, then Data Exchange, then Import Data.
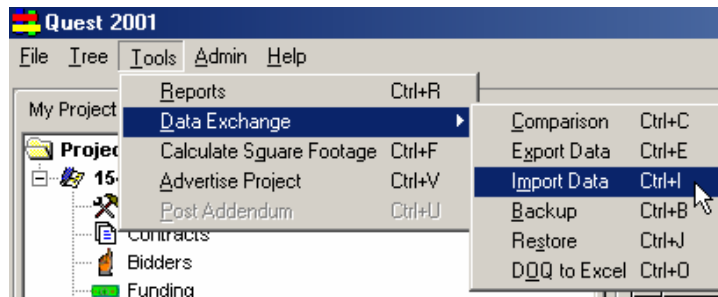
2. The Data Import Screen will appear.
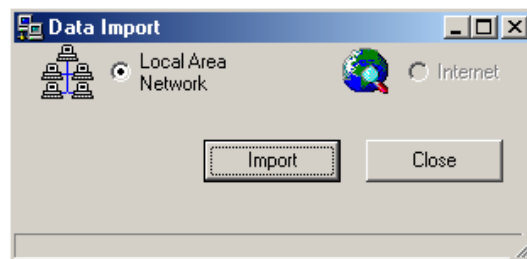
3. Click the [Import] button. The Data Import Browser will appear.
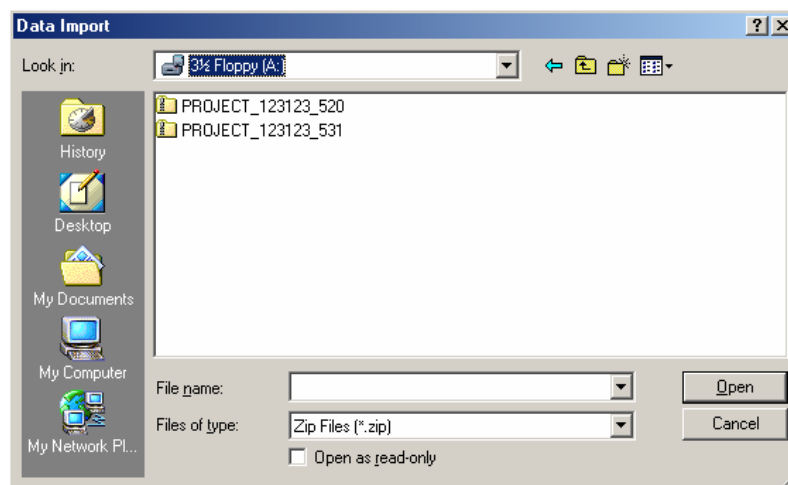
4. Select the location of the .zip file the program should import. Click the [Open] button.

5. A message box appears. Click the [Yes] button.
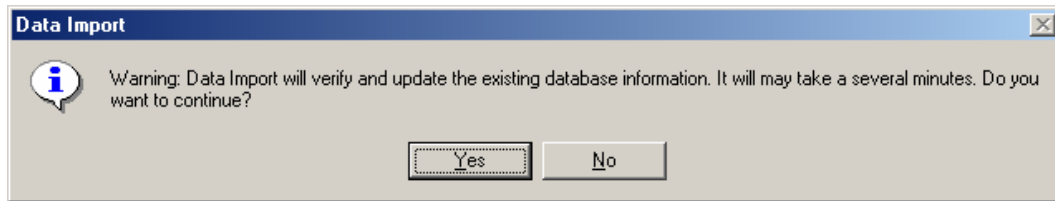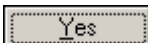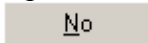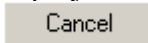
6. Progress will be displayed along the bottom of the Data Import Screen.
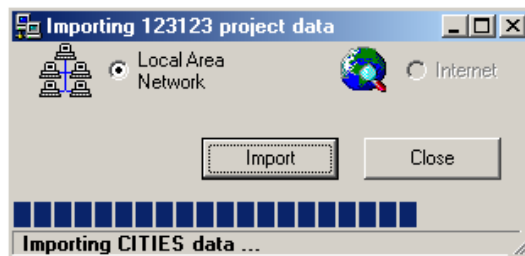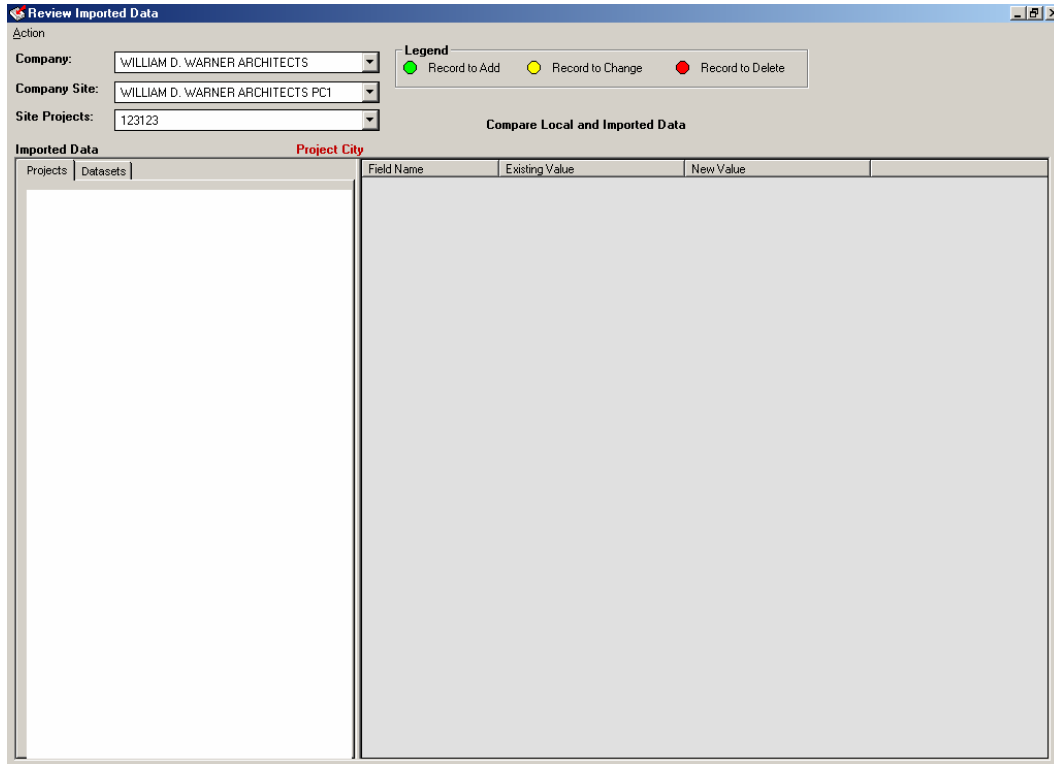
7. When the file has been imported into a temporary file, a prompt will be given with the choice to:
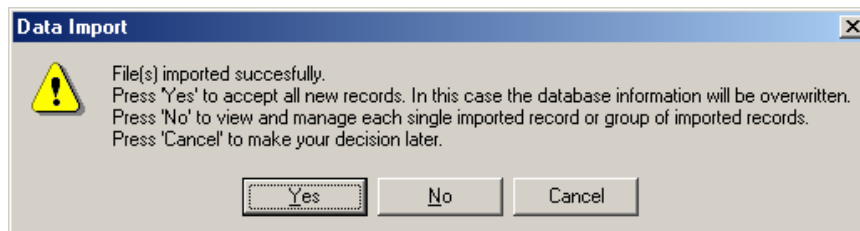
a. Click the [Yes] button to accept all of the project data.
      i. If this project already exists on the current database, it will be completely overwritten with the project data from the imported file.
      ii. If the project does not currently exist on the local database, this is the best option to select.
b. Click the [No] button to view the project data in the **comparison screen**.
      i. This will allow the user to select what project data to accept and update to the project currently in the database.
c. Click the [Cancel] button to not import any data for now.

8. If you clicked ⎡ No ⎤, the Review Imported Data/Comparison Screen appears.

9. Use the drop down menus in the upper left hand corner to select the **Company** and
    Company Site (specific computer) that you are importing from. If you are working
    on more than one project with this company, you will also need to select the **Site
    Project.**

10. When you have selected the correct import information a menu will appear in the
    Project/Dataset Tree view.
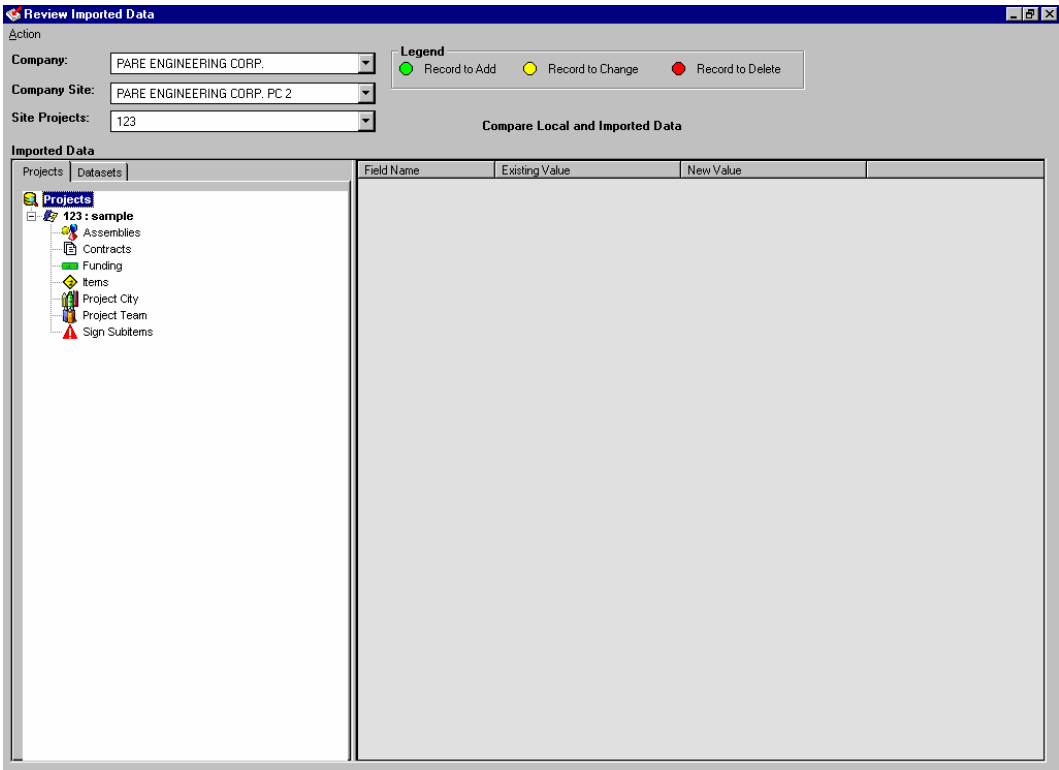
The following steps are an example of a sample comparison screen.

11.1.2 Comparison Screen

The following is a guide for navigating the comparison screen. It is assumed that the project was already entered into Quest before importing the new information.

Importing Information:

Company: The company you are importing from

Company Site: The specific computer exported from

Site Projects: The project's site code

Legend:

Information that has been added is colored **Green**

Information that has been changed is **Yellow**

Information that has been deleted is **Red**

Projects/Datasets
Tree view

The comparison of local and imported data/information will be displayed here.
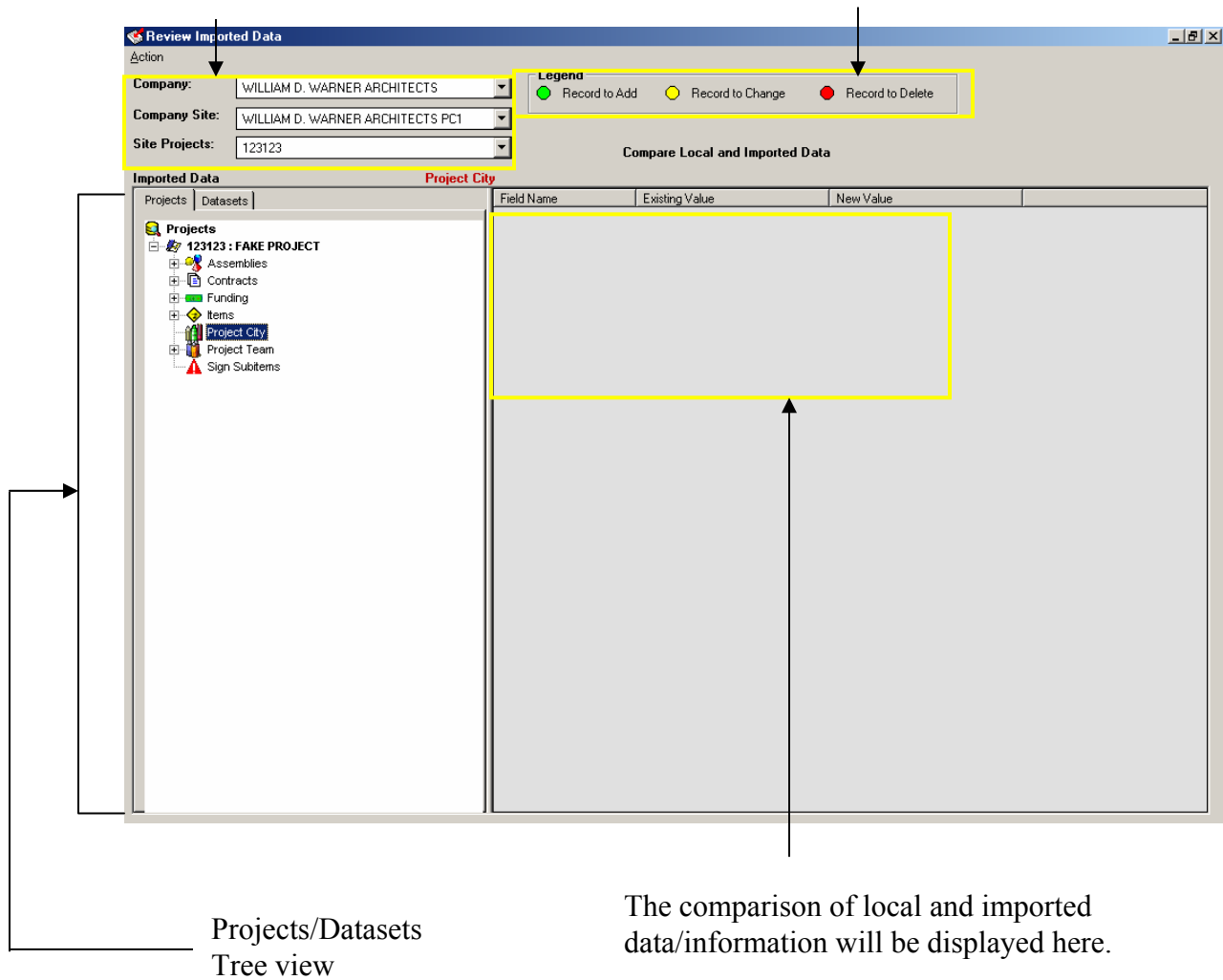
1. To view the changes made to assemblies, click on the 🎈 Assemblies icon.
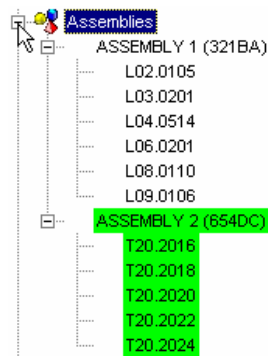
Explanation:
Two assemblies appear. The one highlighted in green, ASSEMBLY 2, is an assembly new to the project on the local machine importing. Everything that is new appears in green.

No changes were made to the first assembly it does not appear highlighted.

2. Click once on ASSEMBLY 2, a comparison explanation appears to the right of the Dataset Tree view. This message reiterates the assembly is new.

Field Name	Existing Value	New Value
ASSEMBLYDESCRIPTION		ASSEMBLY 2 (654DC)
UM		BM
ADDENDUM		0
DELETEDFLAG		False

3. Click once on any item the item comparison will appear.

Field Name	Existing Value	New Value
ITEMCODE		T20.2016
DESCRIPTION		6 INCH EPOXY RESIN PAVEME...
UM		LF
DEPTH		0
FACTOR		0
DEFAULTPAYCODE		
ADDENDUM		0
DELETEDFLAG		False

4. To view the entire assembly item's information click-once on each item. If the item has a location it will appear. Click-once on the location and the station(s) will appear.
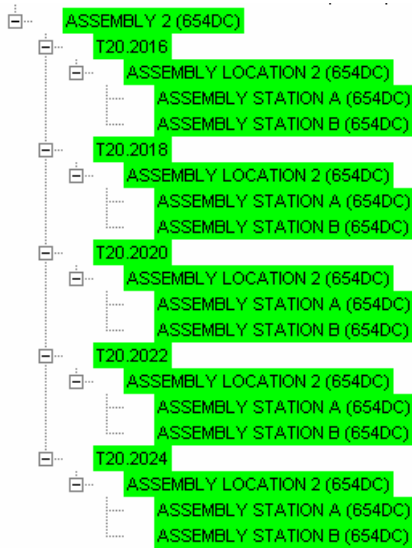
Explanation:
All the items in Assembly 2 have a location, LOCATION 2, and two stations, STATIONS A & B.

The Locations and Stations are all in green because they were added.

5. After approving all of the assembly information and prepare to accept changes, there are two options.

A: Accept the assembly as a whole, by clicking-once on ASSEMBLY 2 and then selecting Action and then Accept Assembly in the toolbar.
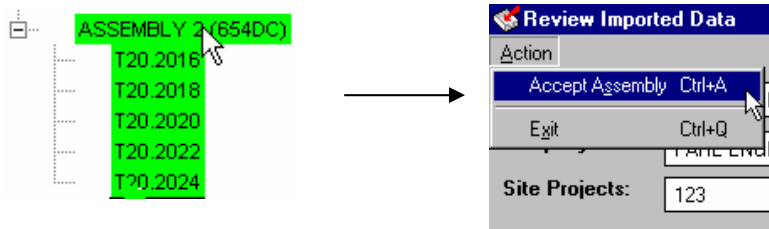
B: Accept assembly items one at a time by clicking-once on any specific item (such as T20.2016 in this example) Action and then Accept Changes in the toolbar.
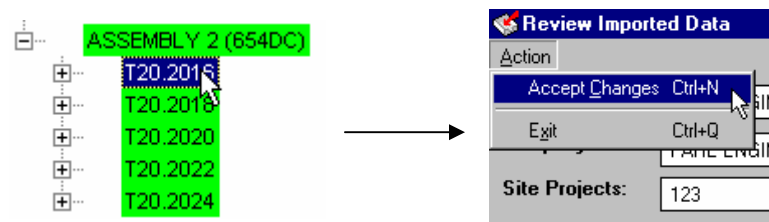
6. After accepting any change the following message appears.
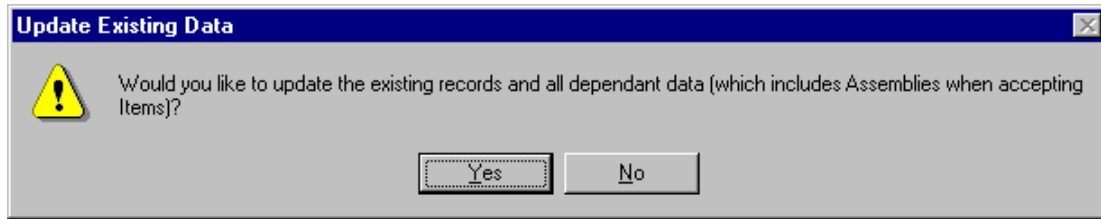
7. Click [Yes]. The following update appears.

8. Click [OK]

9. When the assembly items have been approved they will no longer appear in the Dataset Tree view.
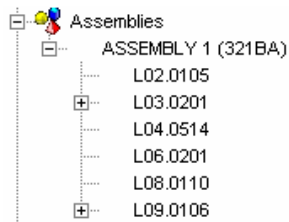
1. To view the changes made to project items, click once on the ⬦ Items icon.
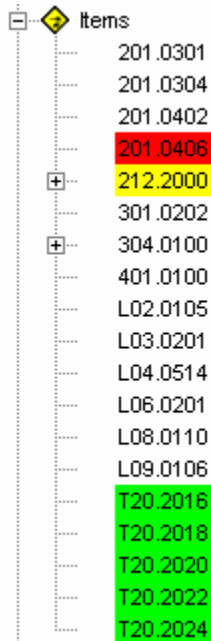
Explanation:

Item 201.0406 appears in red because it has been deleted.

Item 212.2000 appears in yellow because it has been altered.

Items T20.2016-T20.2024 appear in green because they are new.

The items that are not shaded have not been added, altered, or deleted.

2. Click once on item 201.0406 in the tree view to display its comparison description on the right.

Explanation: Note the Field Name column DELETEDFLAG is the only item in yellow. When the value of a DELETEDFLAG is true, the item has been deleted. Compare the Existing and New Value columns. DELETEDFLAG has been changed from False to True.

3. Click the plus sign to the left of the item's location, LOCATION B, STATIONS A & B DROP DOWN. All objects are in red signifying the entire item has been deleted.

4. Click on item 212.2000 in the tree view to display its comparison description on the right.

Explanation: Note the Field Name column ADJUSTEDUNITPRICE appears in yellow, signifying it has been changed. Compare its Existing and New Values. The price was changed from 50 to 45.

5. Click the plus sign to the left of the item's location, LOCATION A, it's station, STATION 2, appears. All objects are in yellow signifying the change in adjusted unit price.
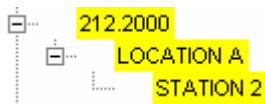
1. Click on item T20.2016 the comparison description appears.

Field Name	Existing Value	New Value
ITEMCODE		T20.2016
DESCRIPTION		6 INCH EPOXY RESIN PAVEME…
QTY		25
DATASETPRICE		0
ADJUSTEDUNITPRICE		0
UM		LF
ADDENDUM		0
JUSTIFICATION		
SPECIALTYITEM		False
DBE		False
WBSID		0
JOBSPECIFICITEM		False
DEFAULTPAYCODE		
REFITEMTYPEID		2
DELETEDFLAG		False
LOWESTACCEPTBID		0
ONLYACCEPTBID		0
WRITTENONLYACCEPTBID		

Explanation: Note the Field Name column is all green and the Existing Value column is empty. This signifies that this item has been added. All of the items that are green will have identical comparison descriptions.

After approving all item information and prepared to accept changes, there are two options.

A: Accept all of the items as a whole, by clicking-once on the ◈ Items icon and then selecting Action and then Accept All in the toolbar.
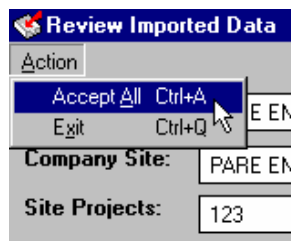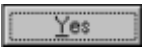
B: Accept items one at a time by clicking-once on any specific item and then selecting Action and then Accept Changes in the toolbar.
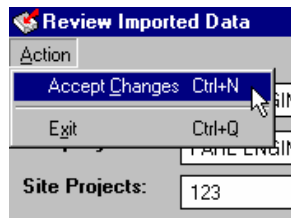
6. After accepting any change the following message appears.

Update Existing Data

Would you like to update the existing records and all dependant data (which includes Assemblies when accepting Items)?

Yes   No

7. Click ⌈ Yes ⌋. The following update appears.

Update Record

Record was updated succesfully.

OK
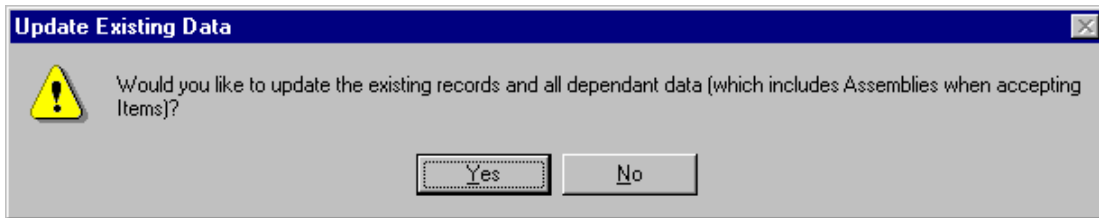
8. Click ⌈ OK ⌋

The same procedure can be followed for every icon in the Dataset Tree view. For a better understanding consult the Rules for Comparison.

11.2 Datasets

1. In the toolbar click on Tools, Data Exchange, and Import. The **Data Import** window will appear.
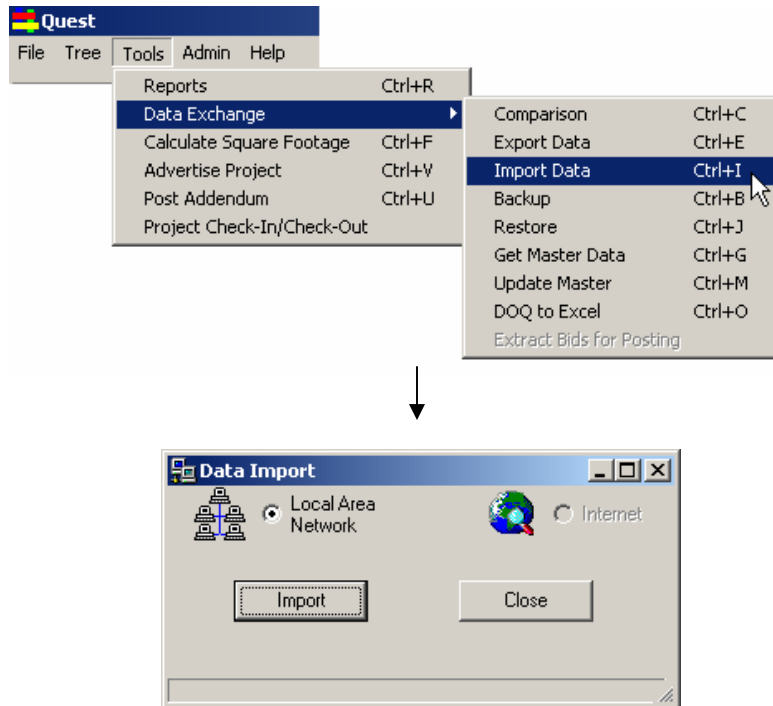
2. Click the Import button. The **Data Import** browser will appear.
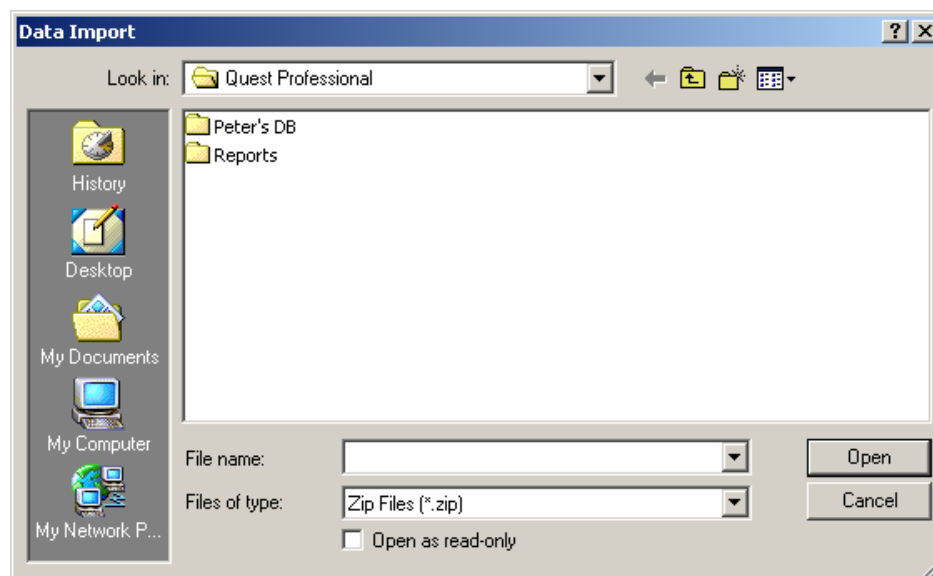
10. Use the browser to locate the where the Dataset file is. The file will look something similar to: DATASETS_533.
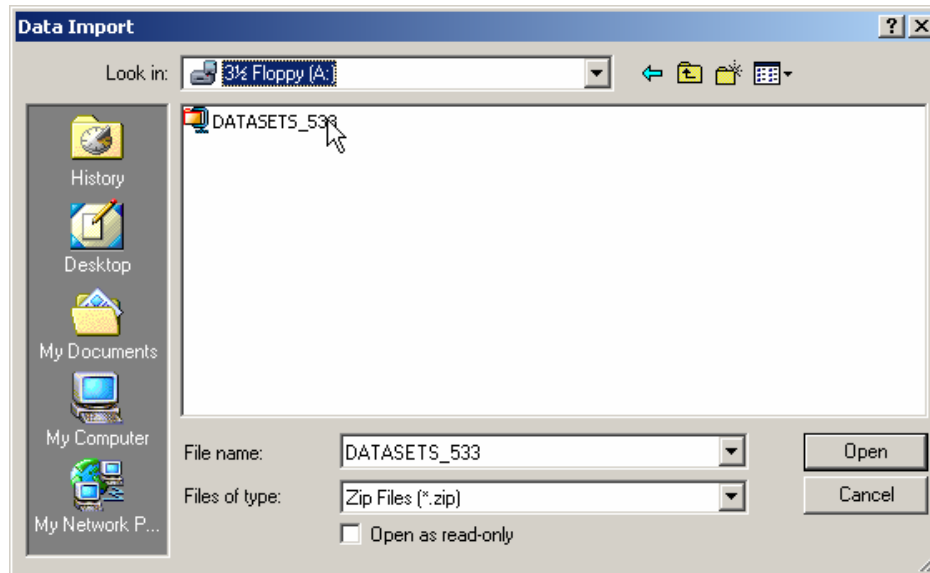
11. Click on the Dataset file and click the [Open] button. A message will appear.
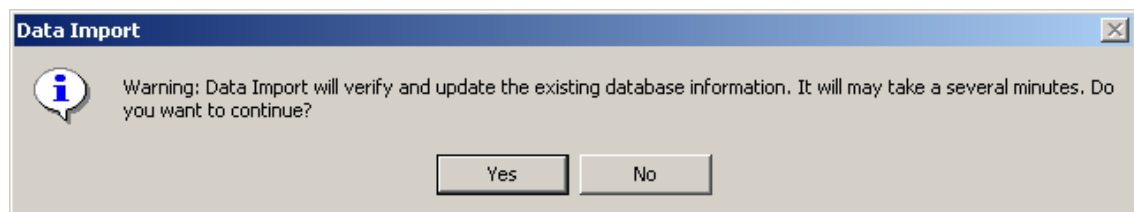
12. Click the [Yes] button. The **Create Dataset Name** window will appear.
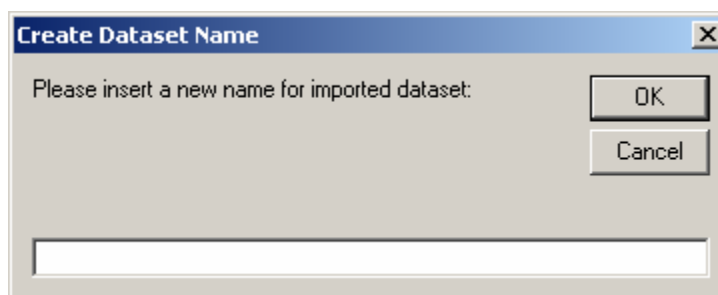
13. Enter in a name for the Dataset and click the [OK] button. The importing will initiate, when finished a message will appear.
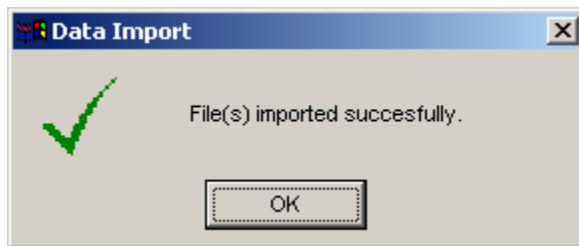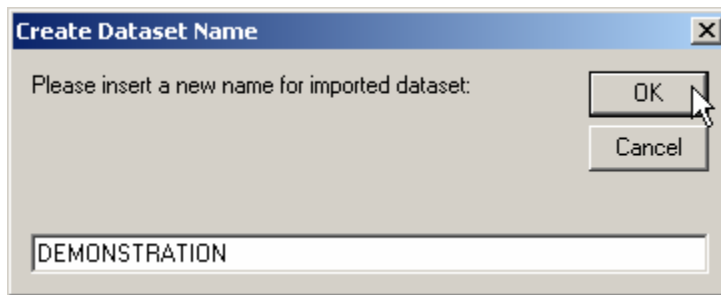
14. Click the [OK] button.

11.3 Support Data

1. In the toolbar click on Tools, Data Exchange, and Import. The **Data Import** window will appear.
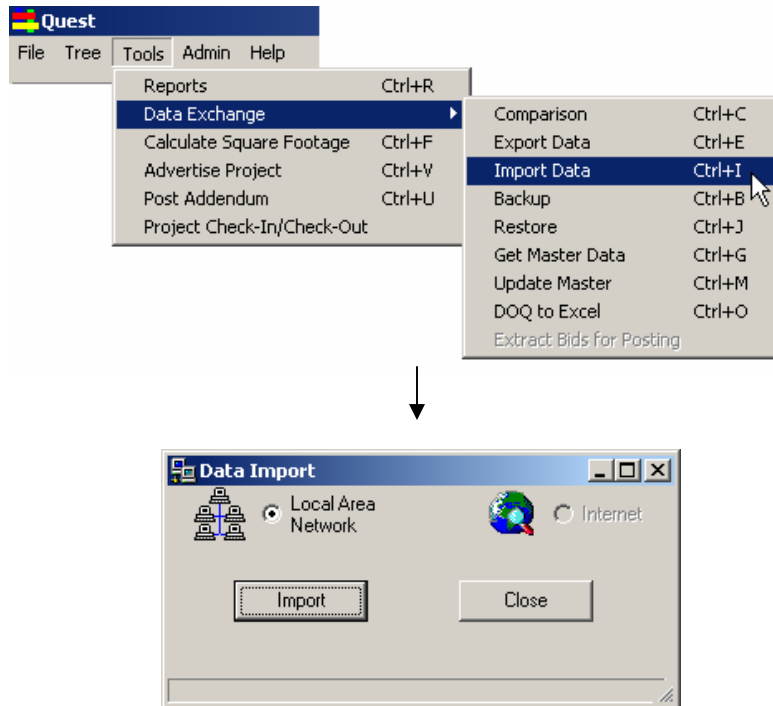
2. Click the [Import] button. The **Data Import** browser will appear.
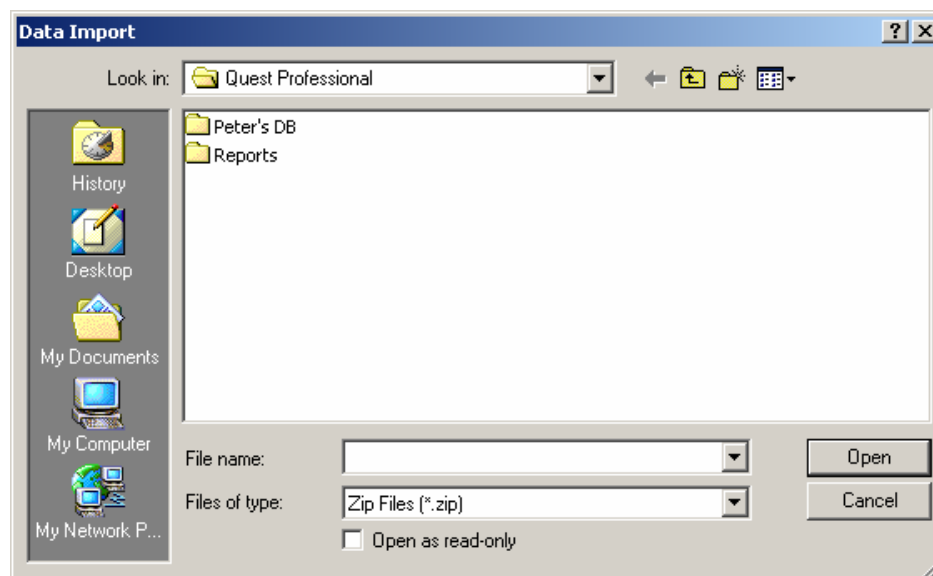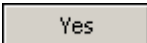
3. Use the browser to locate the where the Support Data file is. The file will look something similar to: SUPPORT DATA_533.
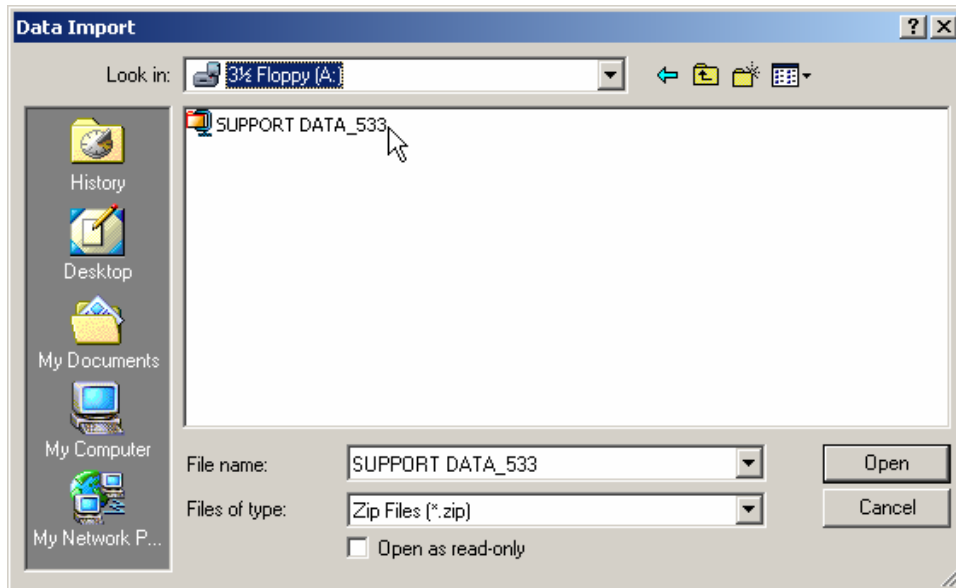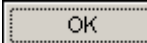
4. Click on the Support Data file and click the [Open] button. The importing will initiate.
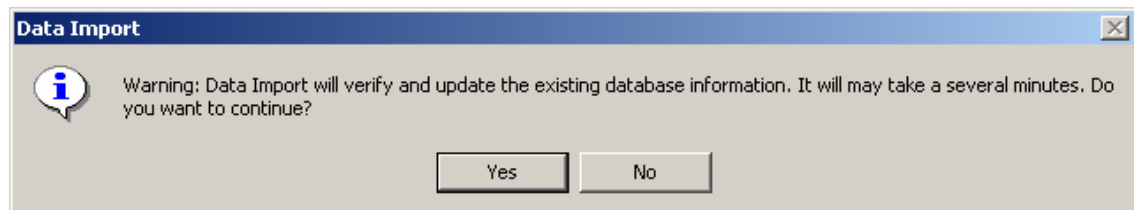
5. Click the [Yes] button. The importing will initiate, when finished a message will appear.
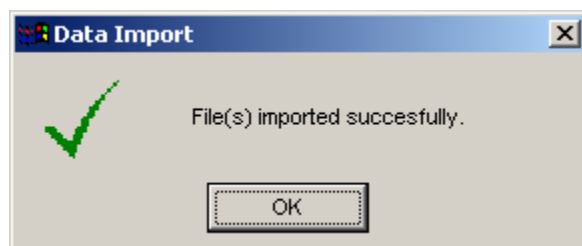
6. Click the [OK] button.

11.4 Sites File

1. In the toolbar click on Tools, Data Exchange, and Import. The **Data Import** window will appear.
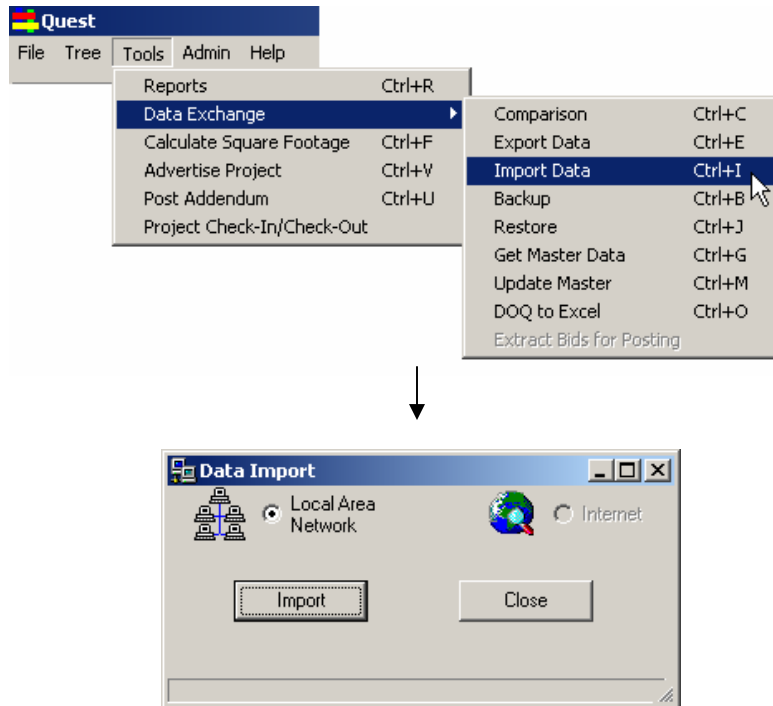
2. Click the [Import] button. The **Data Import** browser will appear.
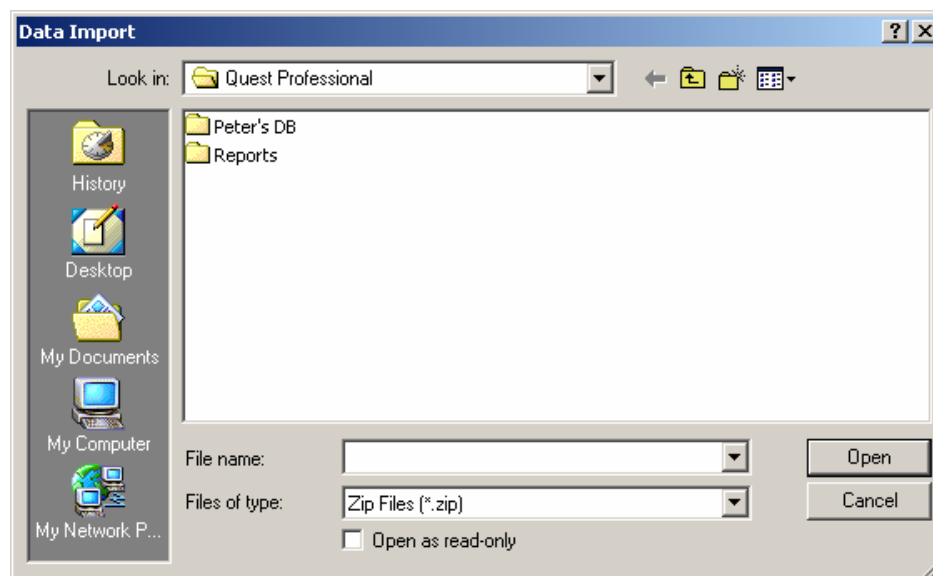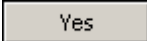
3. Use the browser to locate the where the Sites Info file is. The file will look something similar to: SITES_189.
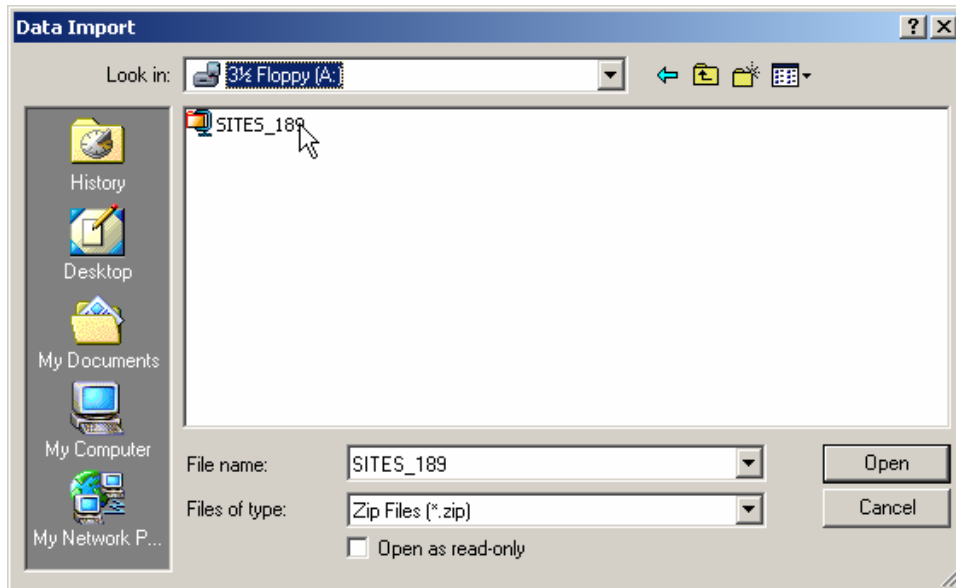
4. Click on the Sites Info file and click the [Open] button. The importing will initiate.
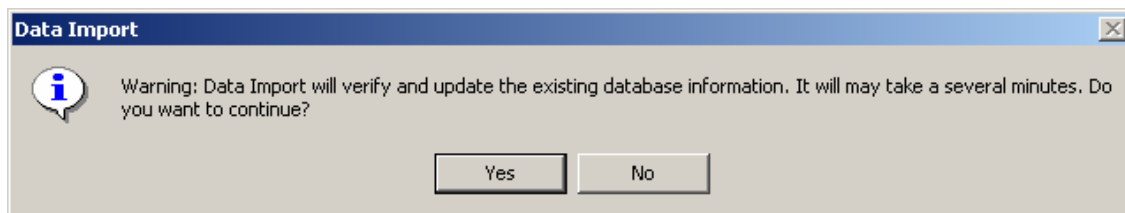
5. Click the [Yes] button. The importing will initiate, when finished a message will appear.
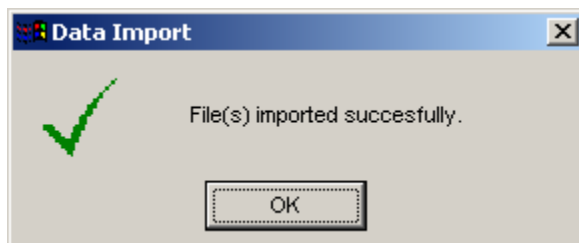
6. Click the [OK] button.
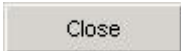
12.   Export

12.1 Project File without Bid Information

1. In the toolbar click on Tools, Data Exchange, and then Export Data. The **Data Export** Screen will display.
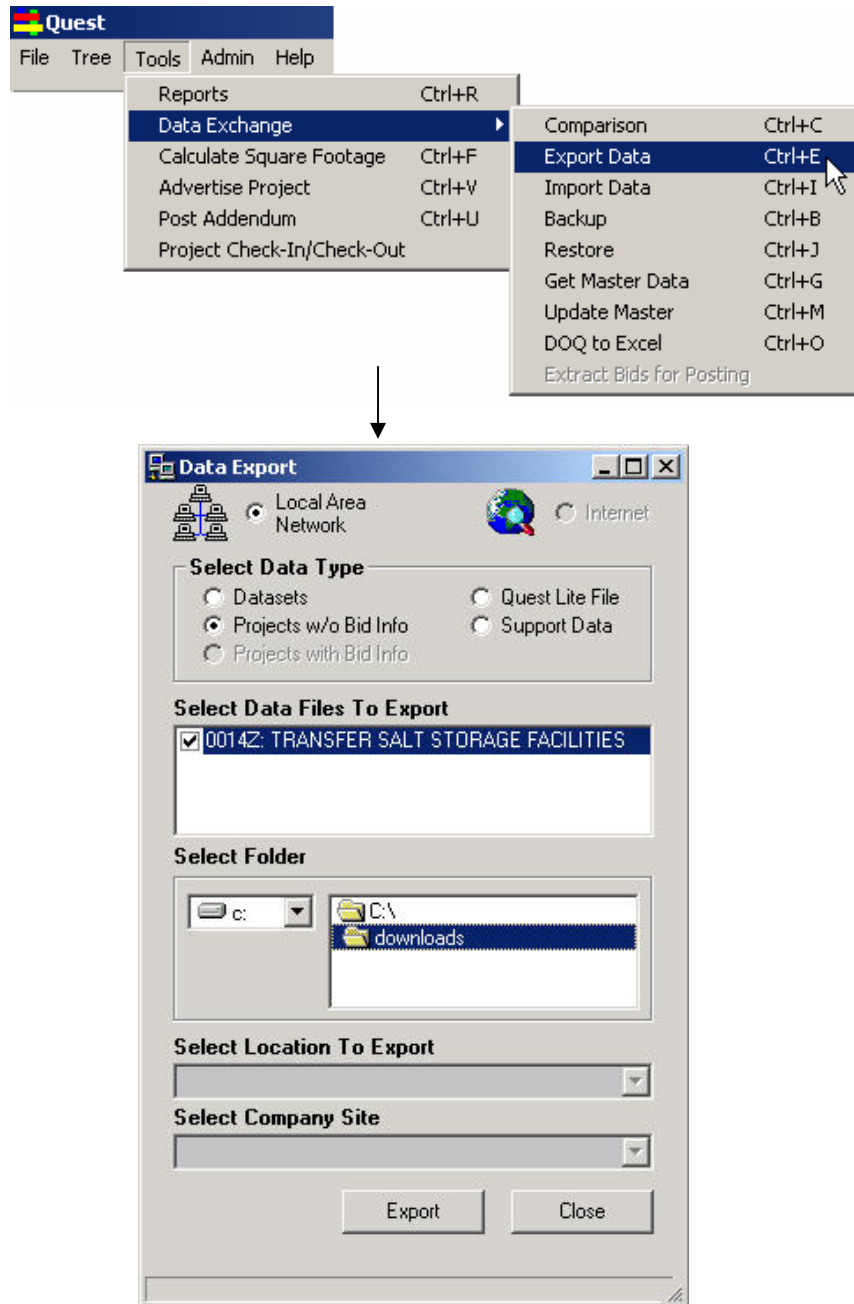
2. Click on the Project w/o bid info option at the top of the Data Export Screen.
3. Click on the box to the left of the project to be exported so that it is now checked.
4. Select the drive and path for the program to save the exported project file.
5. Click the [Export] button.
6. When the exporting of the project file is complete, a message box will appear. Click the [OK] button.
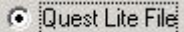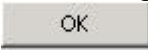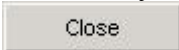
7. Click the [Close] button on the Data Export Screen.
8. The exported Project file will be saved in the format of PROJECT_0014Z_189.zip with 0014Z being the PTS Code for the project and 189 a program generated code identifying the machine that created the exported file.

12.2 Export a Quest Lite File

1. Select from the menu Tools, then Data Exchange, then Export Data. The Export Data Screen will appear.
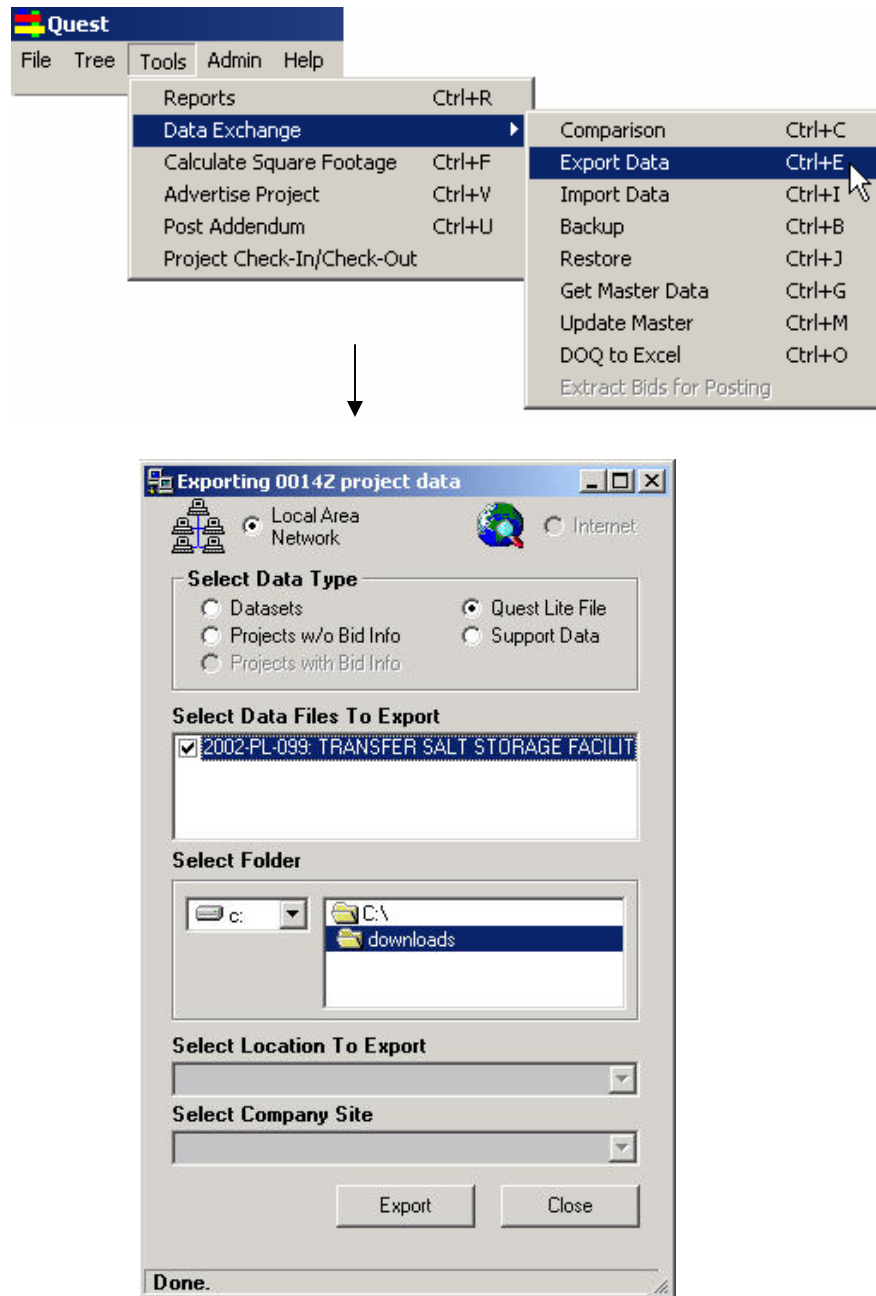
2. Click on the option for Quest Lite File ⊙ Quest Lite File .
3. Click the box to the left of the contract to be exported so that it is now checked.
4. Select the drive and path for the program to export and save the Quest Lite File.
5. Click the [Export] button.

6. Once the exporting has completed, a message box will appear stating the file has exported successfully. Click the [OK] button.

7. Click the [Close] button on the Data Export Screen.

8. The file will be saved in a format similar to CONTRACT_2002-PL-099_ADD-5_189.zip where 2002-PL-099 is the RIC Number, the ADD-5 is the addendum number for the contract, and 189 is a program generated code identifying the machine the file was exported from.

12.3 Datasets

1. In the toolbar click on Tools, Data Exchange, and Export. The Data Export window will appear.
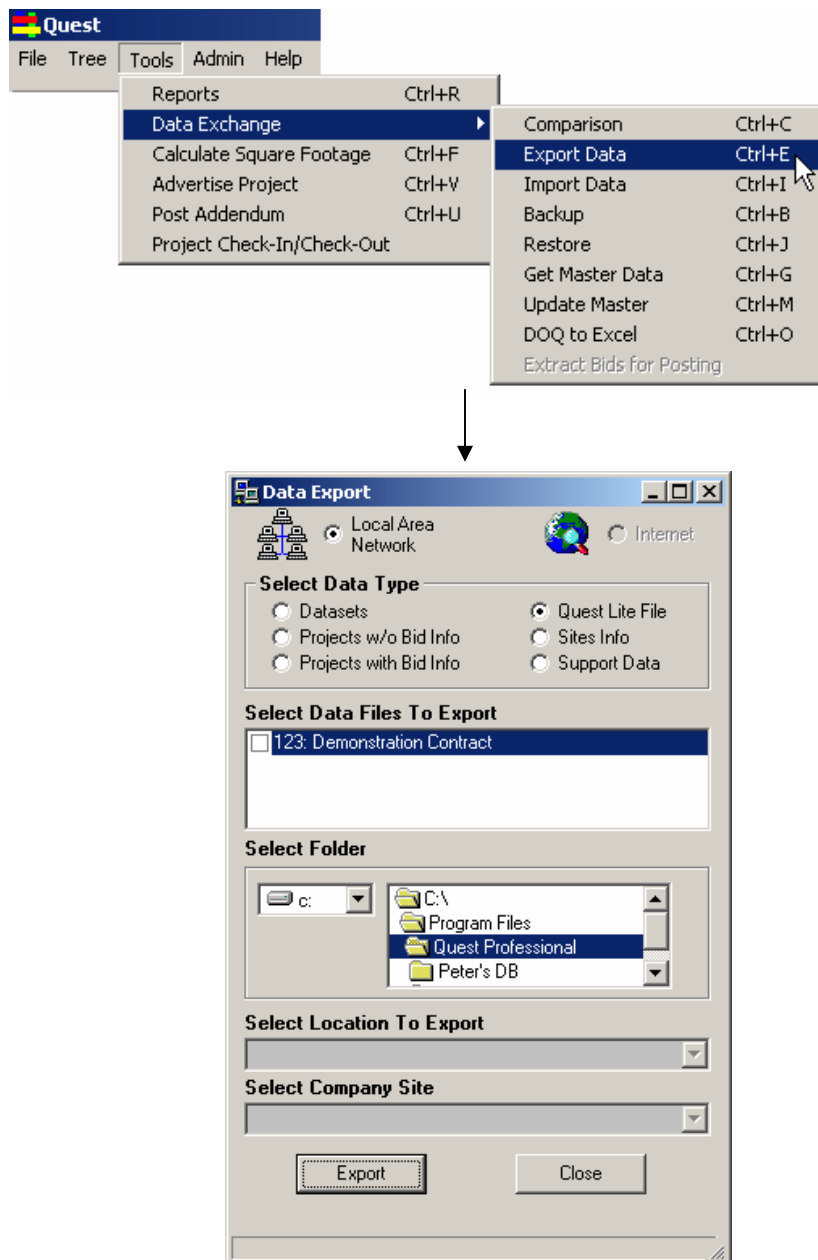
2. In the **Select Data Type** section click in the circle to the left of Datasets, placing a dot in the circle.
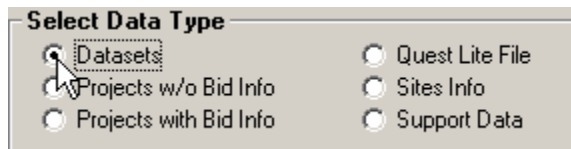
3. In the **Select Data Files To Export** section select the Dataset to be export by clinking in the square to the left of the dataset placing a checkmark in the square.
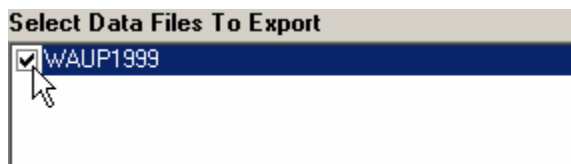
4. In the **Select Folder** section select where the file should be exported to by clicking the ▼ button to select the drive and folder.
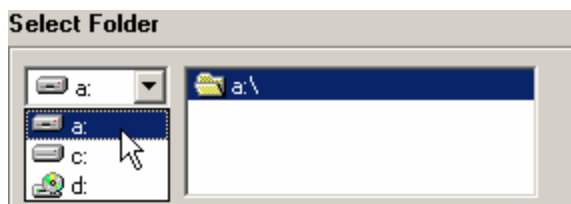
5. Click the [Export] button. The exporting will initiate, when finished a message will appear stating the file(s) exported successfully.
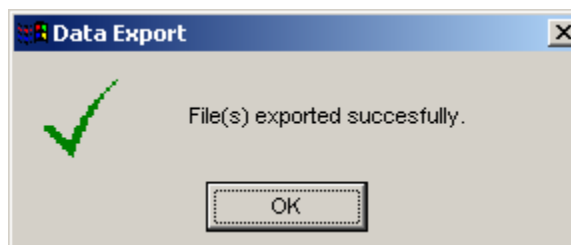
6. Click the [OK] button.

12.4 Export Sites

1. In the toolbar click on Tools, Data Exchange, and Export. The Data Export window will appear.
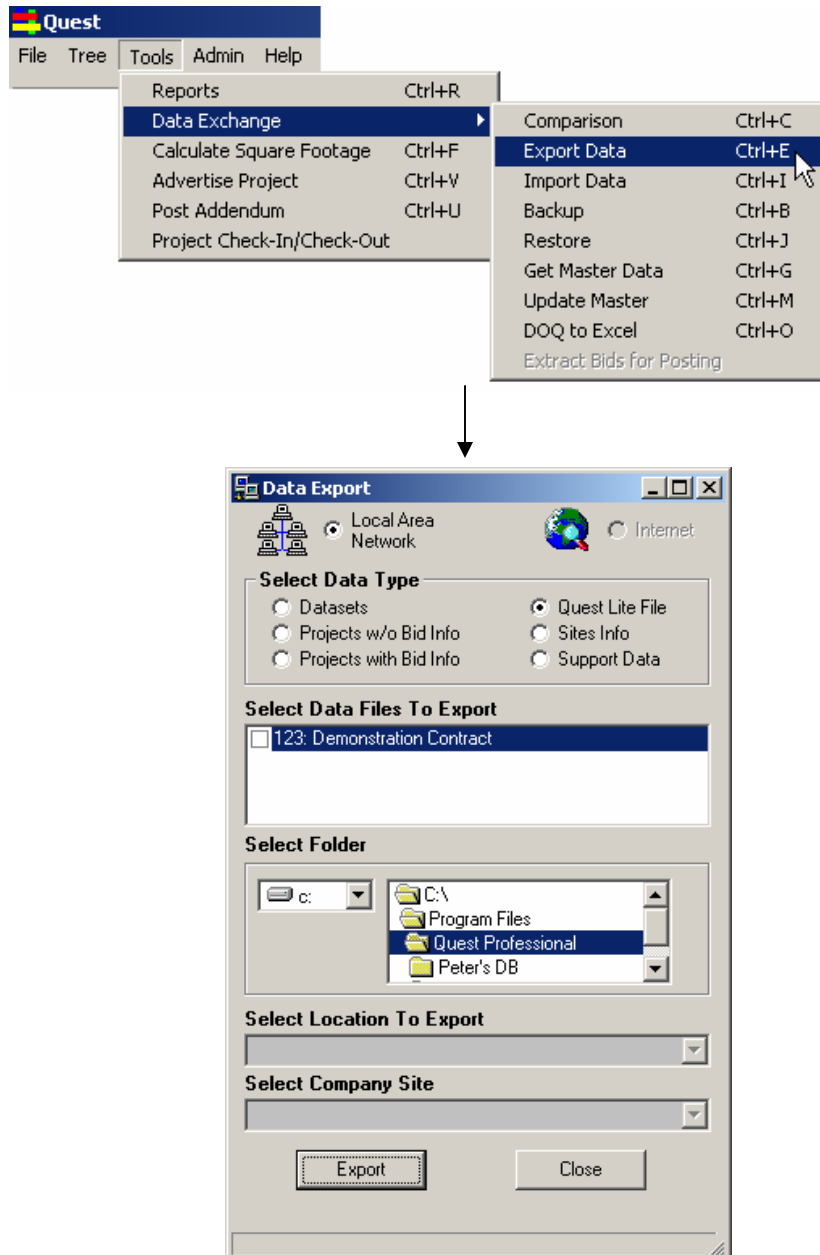
2. In the **Select Data Type** section click in the circle to the left of Sites Info, placing a dot in the circle.
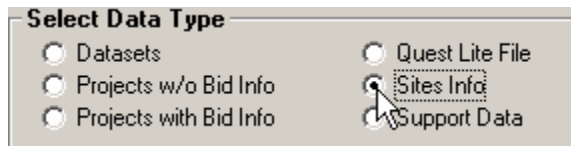
3. In the **Select Folder** section select where the file should be exported to by clicking the ▾ button to select the drive and folder.
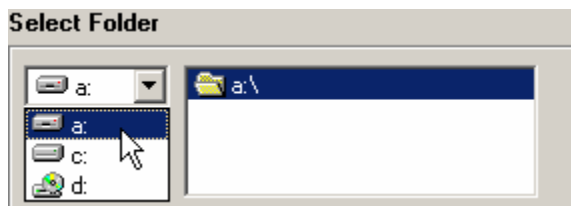
4. Click the [Export] button. The exporting will initiate, when finished a message will appear stating the file(s) exported successfully.
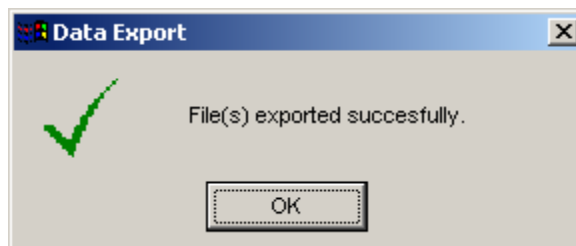
5. Click the [OK] button.

12.5 Support Data

1. In the toolbar click on Tools, Data Exchange, and Export. The Data Export window will appear.
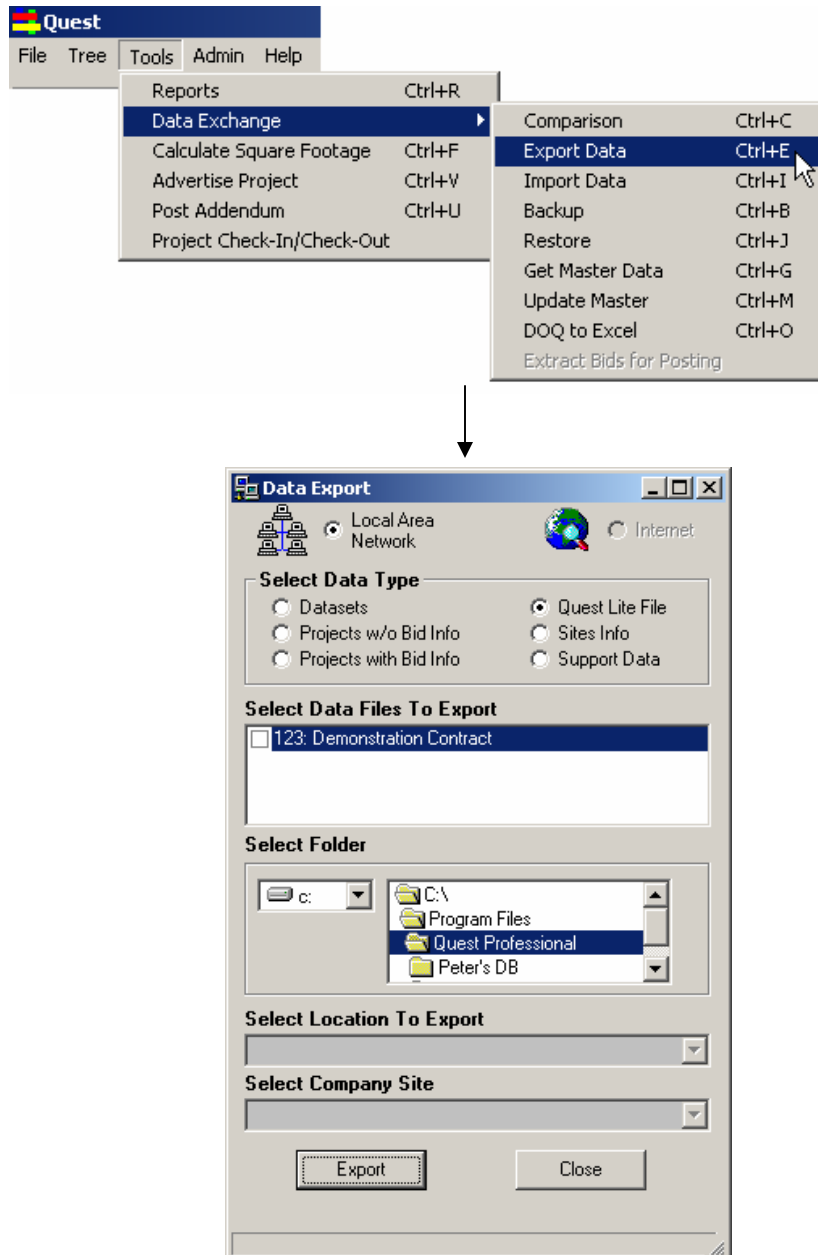
2. In the **Select Data Type** section click in the circle to the left of Support Data, placing a dot in the circle.
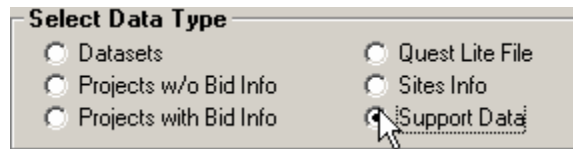
3. In the **Select Folder** section select where the file should be exported to by clicking the ▼ button to select the drive and folder.
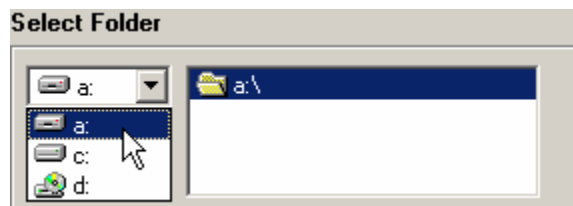
4. Click the [Export] button. The exporting will initiate, when finished a message will appear stating the file(s) exported successfully.
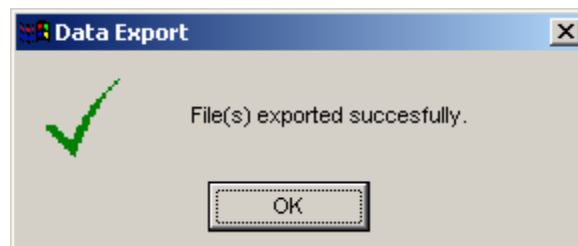
5. Click the [OK] button.

13. Backup

1. In the toolbar click Tools, Data Exchange, and then Backup.
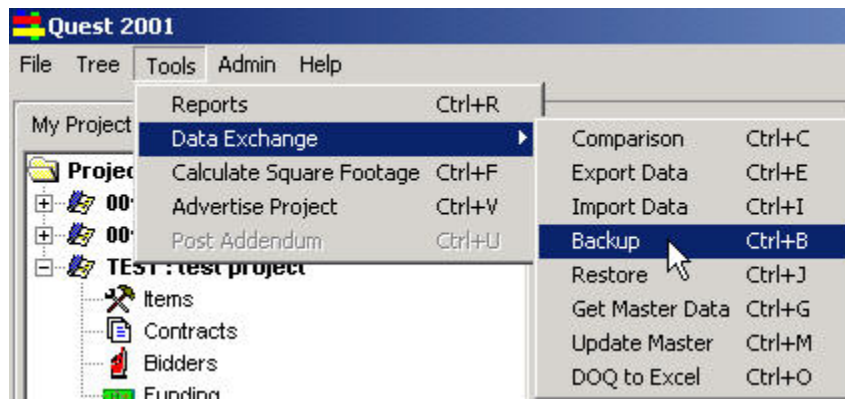
2. Select the project to be backed up, by clicking the mouse pointer in the checkbox to the left of the project's PTS Code and Name.
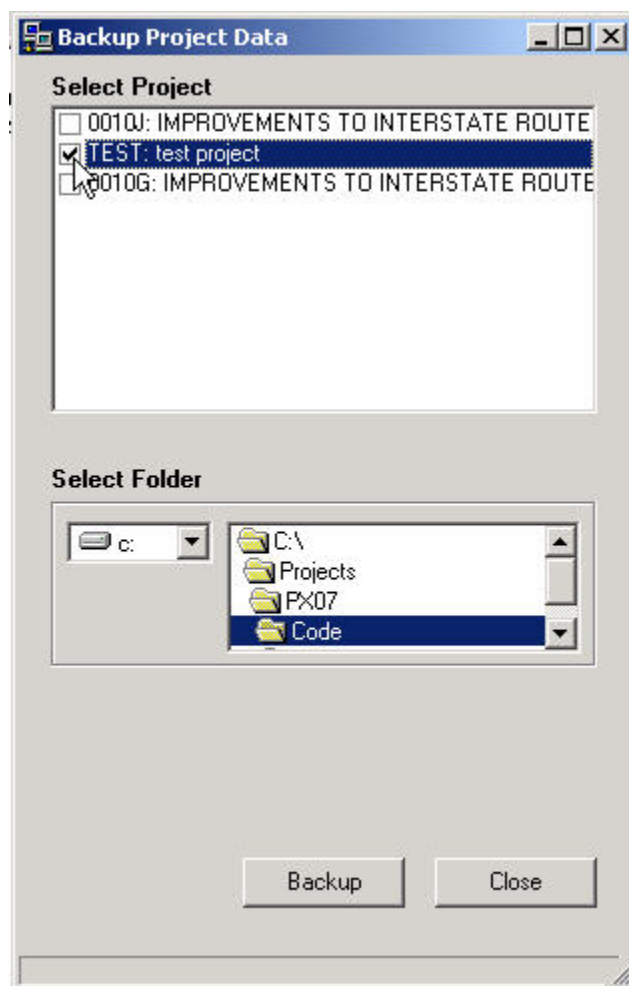
3. Select the path to save the backup file for the project

4. Click the [Backup] button. When the backup has completed, a confirmation message box will appear.

5. Click the [OK] button.

13. Restore

1. Select Tools, then Data Exchange, then Restore.
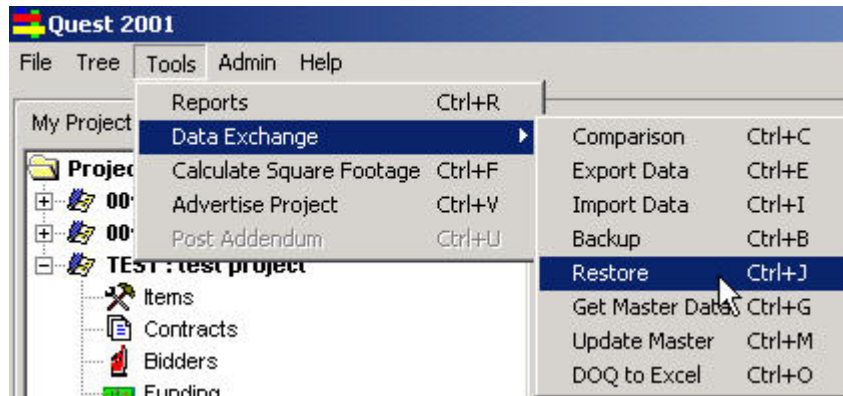
2. Click the ⬚Restore⬚ on the Restore Screen.
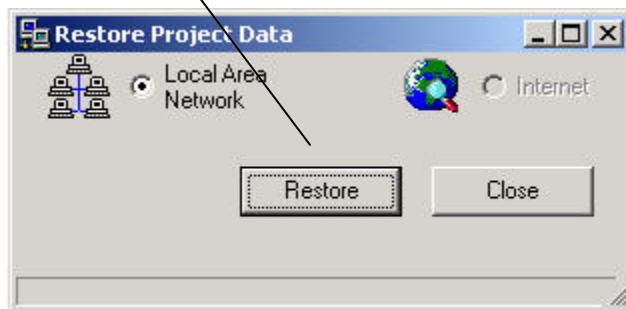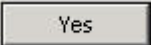
3. Select the project backup file that is to be restored to the program. The file will look similar to PROJECT BACKUP TEST_163.ZIP. TEST is the project name and 163 is a program generated code.
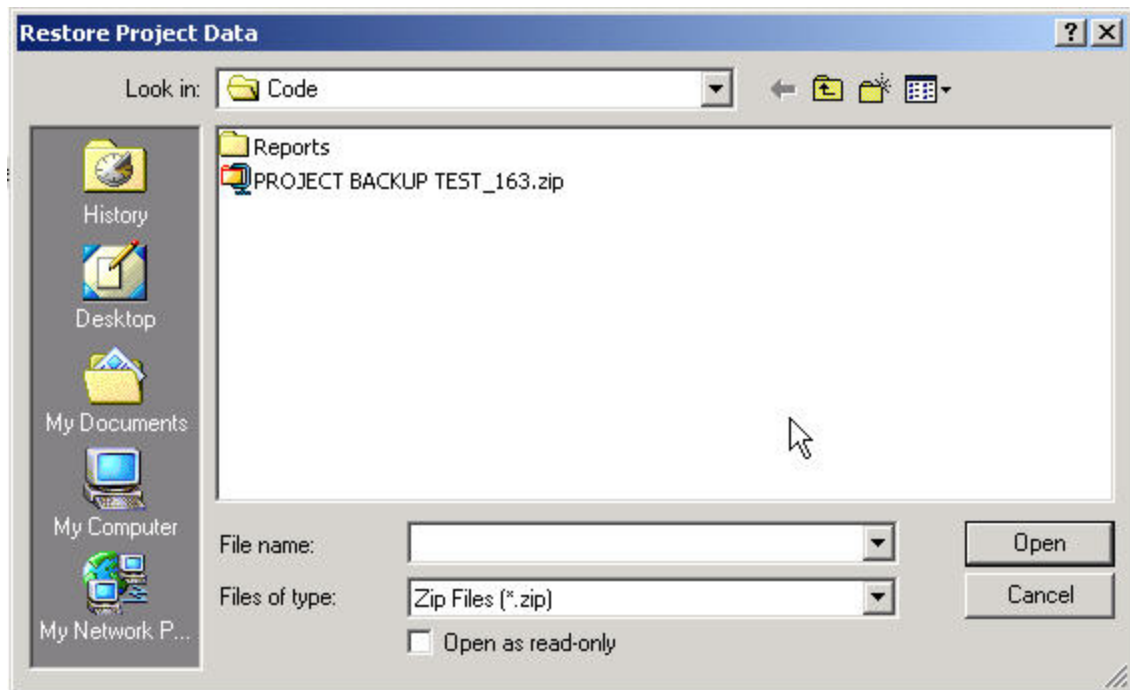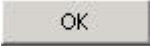
4. Click the Open Button. A window will appear to confirm the project's backup file should be restored; causing any changes made after the backup file was created to be removed from the project.
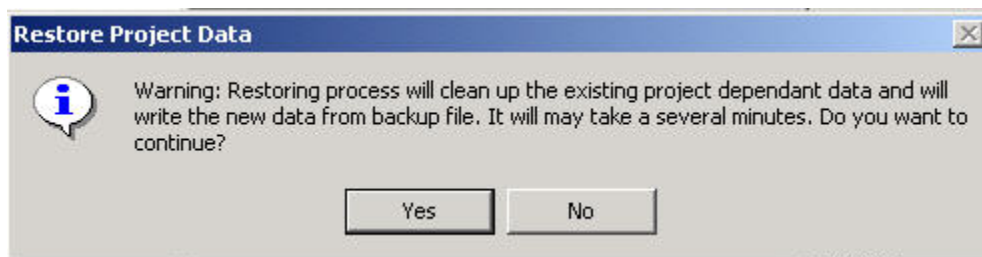
5. Click the [Yes] button. After the project has completed restoring, a message window will appear stating the project has been restored successfully.

6. Click the [OK] button.

7. Click the [Close] button on the Restore Screen.

14. Advertise

14.1 Standalone Application

1. Select the project to be advertised by clicking once on the Project Node in the My Projects Tab.
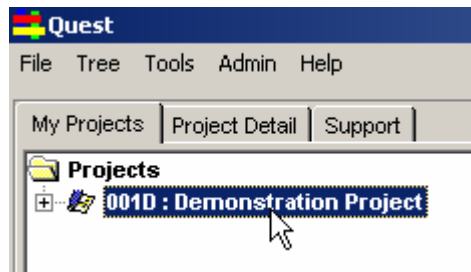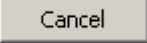
2. Select from the Tools menu, the Advertise Project Option.
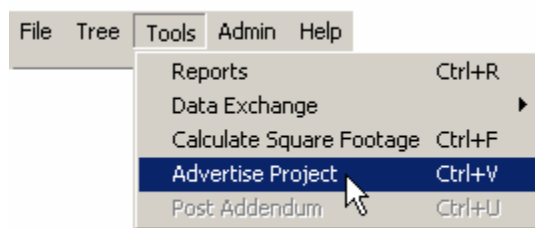
3. A message box will appear confirming the selected project is to be advertised.
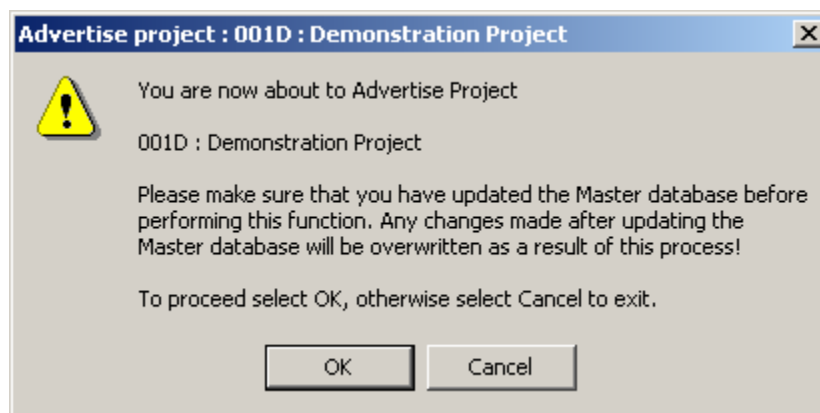
4. Select the ⎸ OK ⎹ Button to continue. Select the ⎸ Cancel ⎹ button to Cancel.

5. The Advertising Wizard will appear. This will proceed through a verification process to confirm the contract is ready to be advertised.
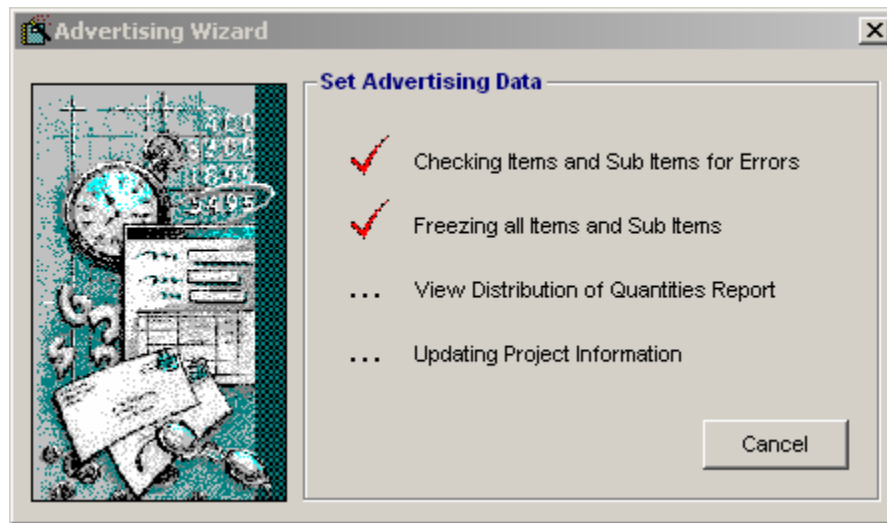
6. If at anytime a message appears stating that something is missing, the advertising process will be automatically cancelled.

7. Once the verification process is complete, a message will ask if the Distribution of Quantities should be opened.
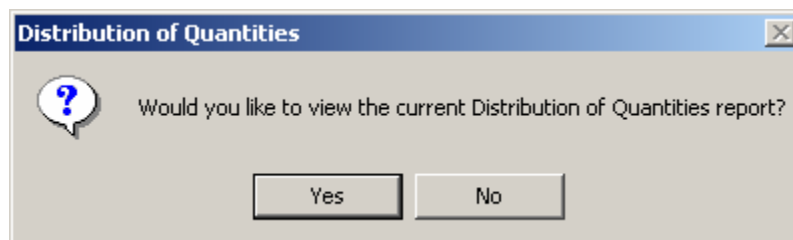
8. If No is selected, the Distribution of Quantities will not appear.

9. If Yes is selected, the Distribution of Quantities will appear. The Advertising Process will not complete until the Distribution of Quantities Report is closed.

To close out of the DOQ Report click this X.
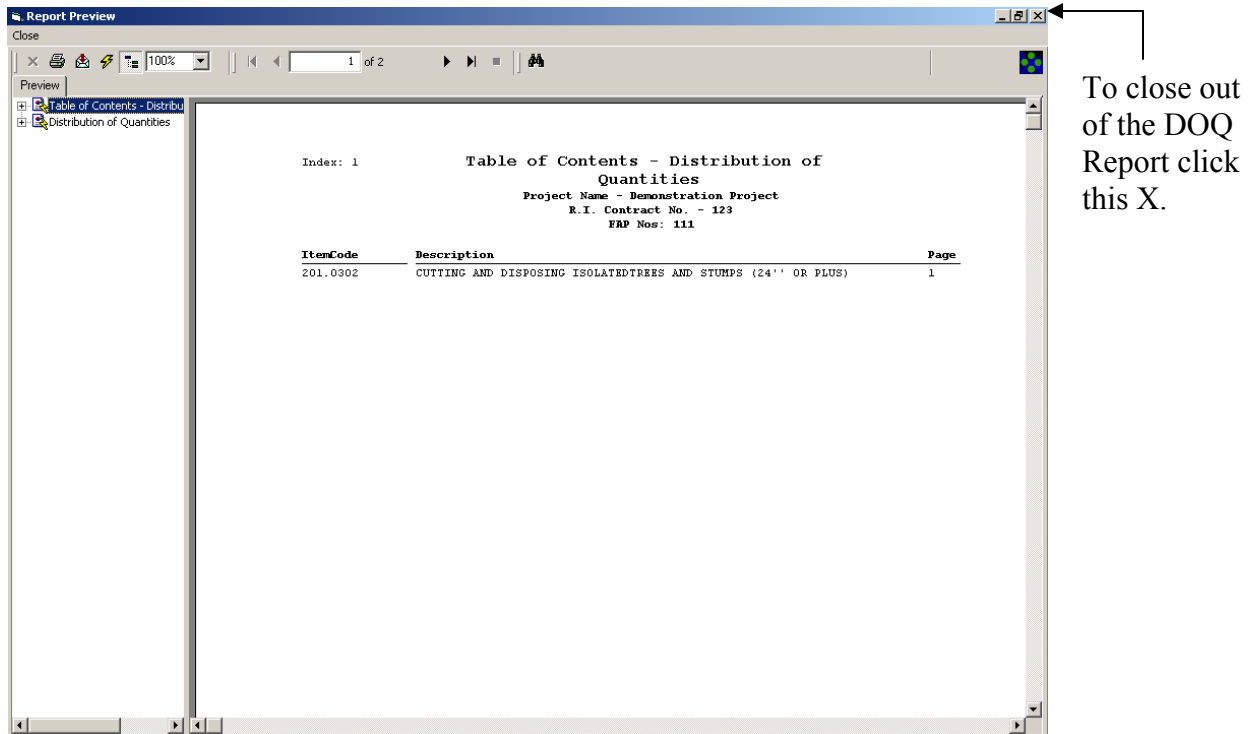
10. A message will appear confirming the contract is to be advertised.
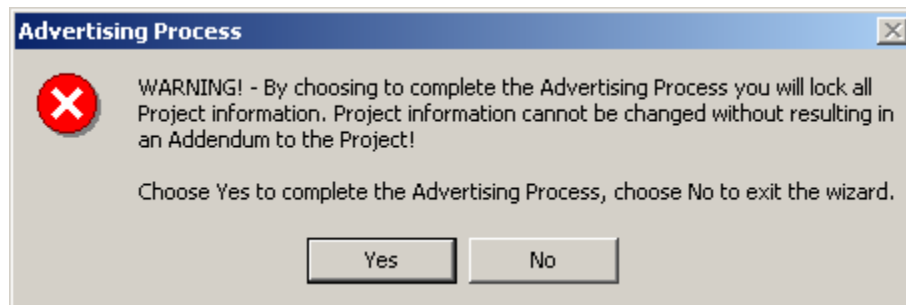
11. Click the [Yes] button.

12. Once the Advertising Process is complete, a message will appear stating the
contract has been advertised successfully.

13. Click the **Exit** button.

14.2 Network Application

Before a project can be advertised under a Network Application, the project must first be updated to the master database to ensure the latest changes on the local machine are on the master database.

1. Select the project to be advertised by clicking once on the Project Node in the My Projects Tab.
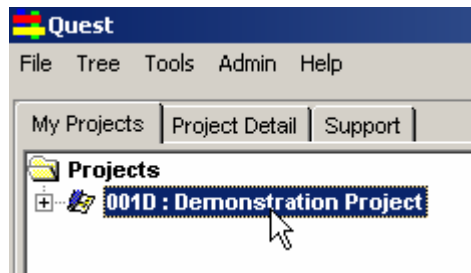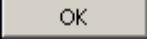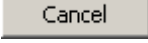
2. Select from the Tools menu, the Advertise Project Option.
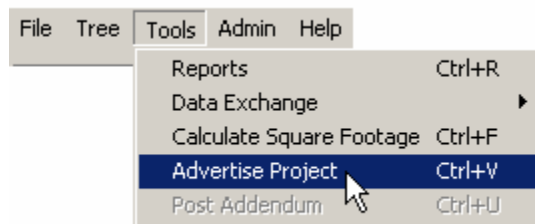
3. A message box will appear confirming the selected project is to be advertised.
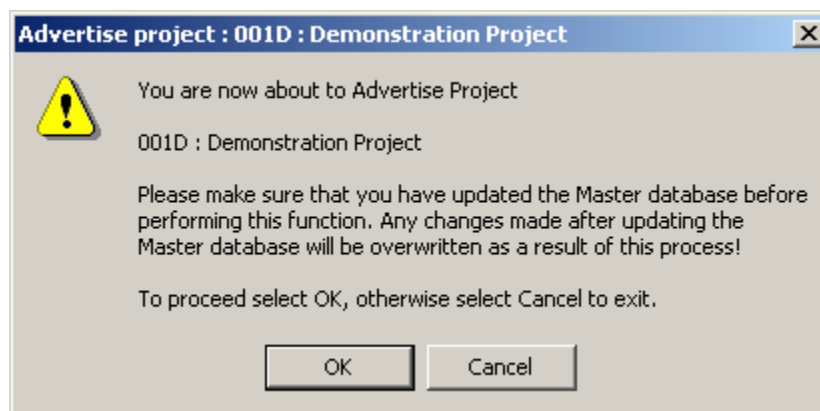
4. Select the **OK** Button to continue. Select the **Cancel** button to cancel.
5. If selected OK, the Advertising Wizard will appear. This will proceed through a verification process to confirm the contract is ready to be advertised.
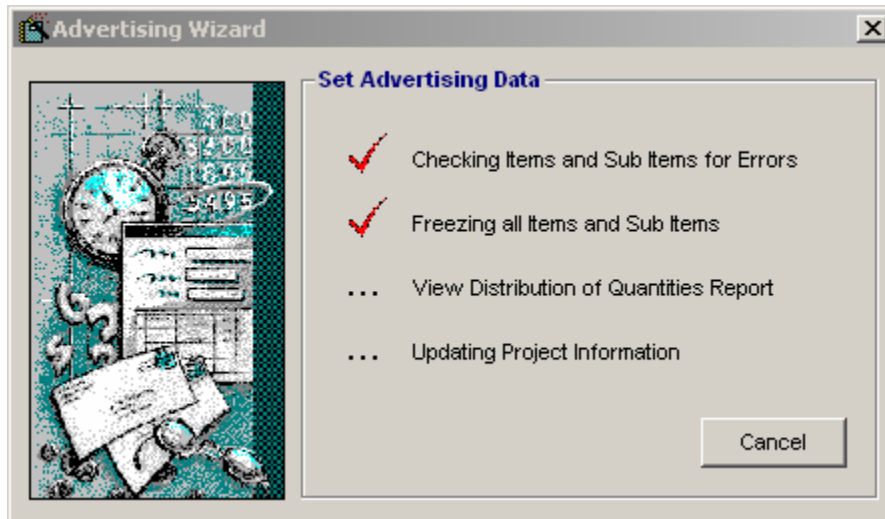
NOTE: If at anytime a message appears stating that something is missing; the advertising process will be automatically cancelled.

9. Once the verification process is complete, a message will ask if the Distribution of Quantities should be opened.
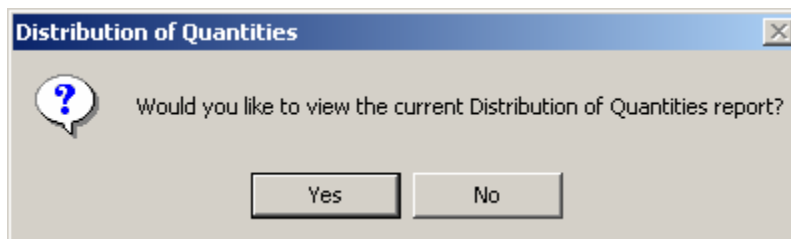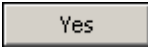
10. If No is selected; the Distribution of Quantities will not appear.

11. If Yes is selected; the Distribution of Quantities will appear. The Advertising Process will not complete until the Distribution of Quantities Report is closed.

To close out of the DOQ Report click this X.
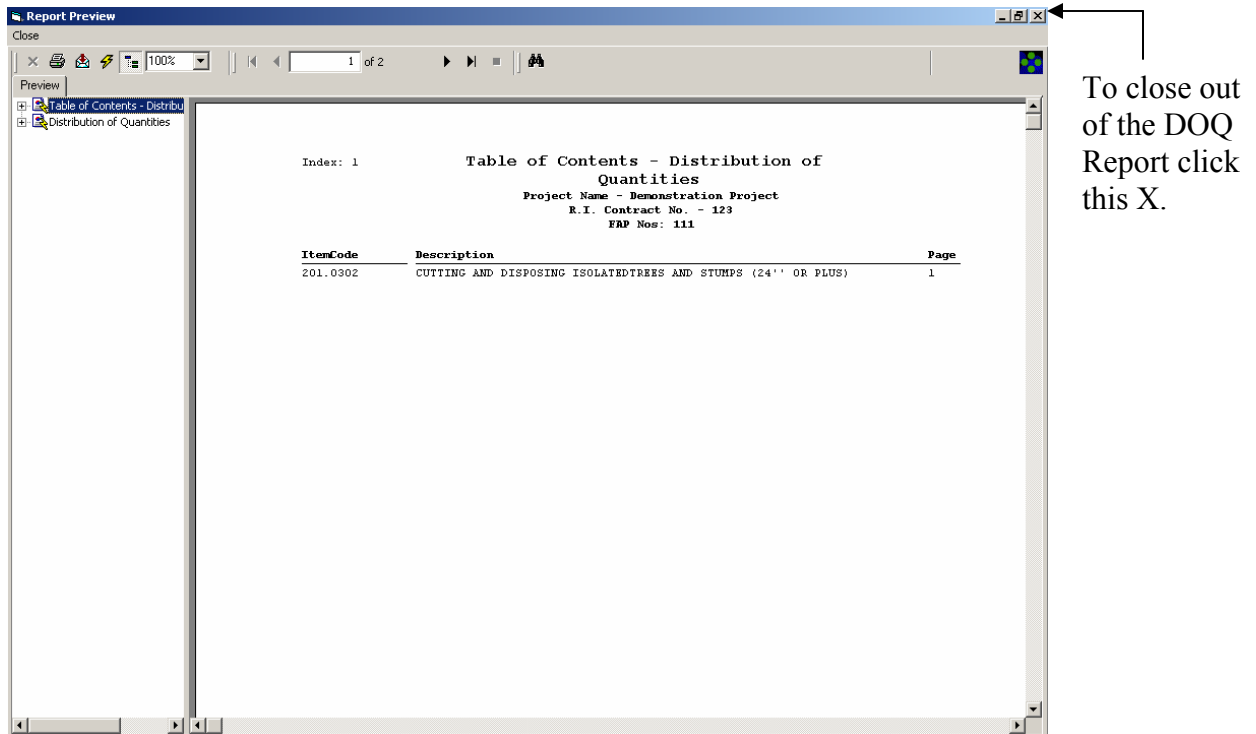
12. A message will appear confirming the contract is to be advertised.
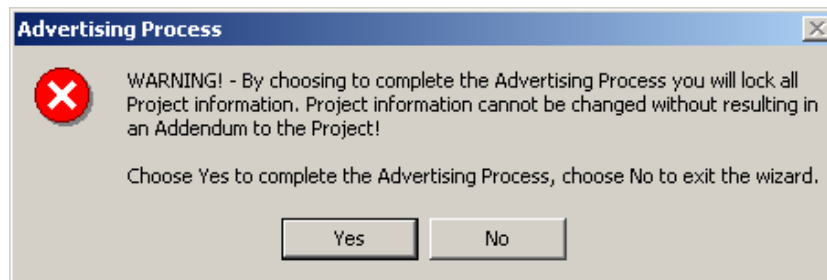
13. Click the [Yes] button.

14. Once the Advertising Process is complete, a message will appear stating the contract has been advertised successfully.

15. Click [Exit].
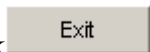
15. Addendum

15.1 Set an Addendum

15.1.1 Standalone Application

1. Click on the plus sign to the left of the project you wish to set an addendum to. The project menu will drop down.

2.   Click on the Addenda node in the project menu. The Addenda screen will appear
      to the right of the tree view.

3.   Click on the [Set Addendum] button at the bottom of the screen. The following
      message will appear.

4.   Click the [Continue] button. The following message will appear.

5.   Click the [OK] button. The project is now in Addendum 1 as noted in the Addenda screen.

15.1.2 Network Application

1. Click on the plus sign to the left of the project you wish to set an addendum to. The project menu will drop down.

2. Click on the Addenda node in the project menu. The Addenda screen will appear to the right of the tree view.

3. Click on the [Set Addendum] button at the bottom of the screen. The following message will appear.

4. Click the [Continue] button. The following message will appear.

5. Click the [OK] button. The project is now in Addendum 1 as noted in the Addenda screen.

15.2 Enter Addendum Information

NOTE: After advertising a project or posting an Addendum all project items will become locked. The project team read/write permissions will need to be reset to allow any addendum changes to the project item information.

All information entered on the screen will be displayed on the Addendum Cover Letter Report.

Please review the rules pertaining to an addendum before proceeding.

15.2.1 Access the Addenda Screen

1. On the My Projects tab, click on the plus sign to the left of the project you wish to set an addendum to. The project menu will drop down.

2.   Click on the Addenda node in the project menu. The Addenda screen will appear to the right of the tree view.

15.2.2 Add a Category

There are two ways of entering a category.

A. Default Category Groups menu

1. Click on the **Add Categories** button. The Add Categories screen will appear.
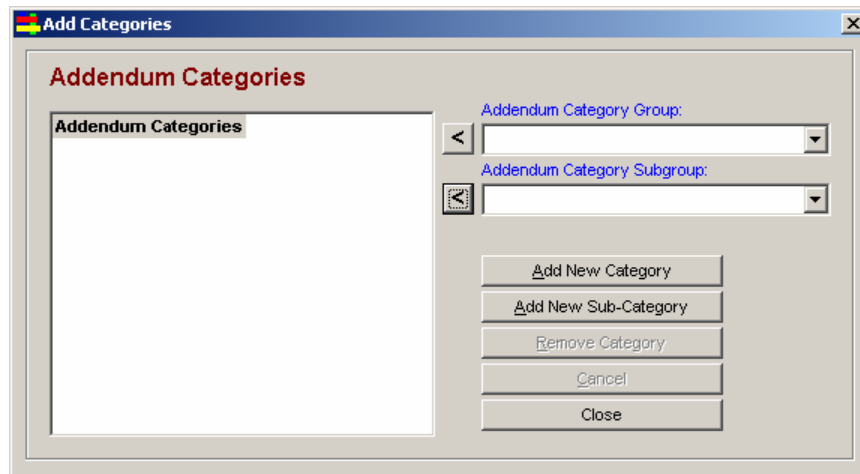
2. To select a default Addendum Category click on the ▼ button to the right of the Addendum Category Group text field.
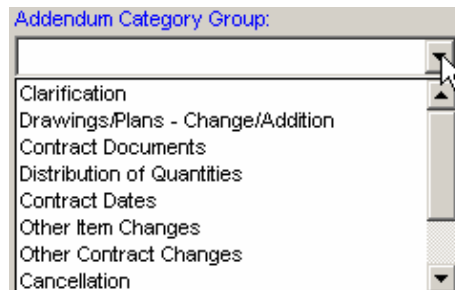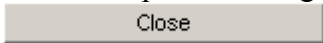
3. Use the scroll bar on the side to view all possible categories.
4. To select a category click once on the category name. The category will now appear in the Addendum Category Group text box.
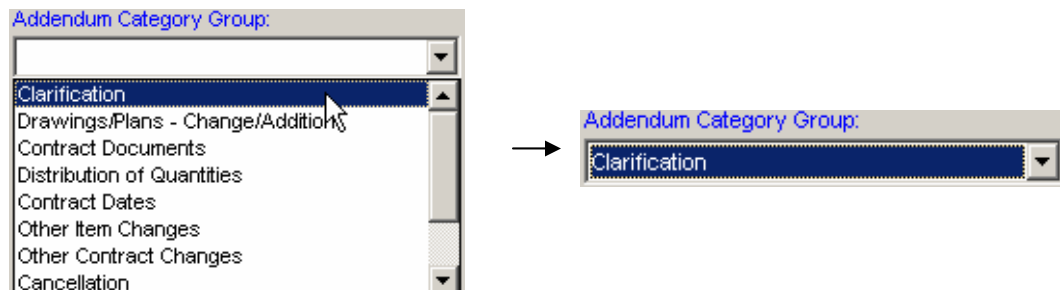
5. Click on the ☐ button to the left of the Addendum Category Group text field.
    The category will now appear in the Addendum Categories text field.
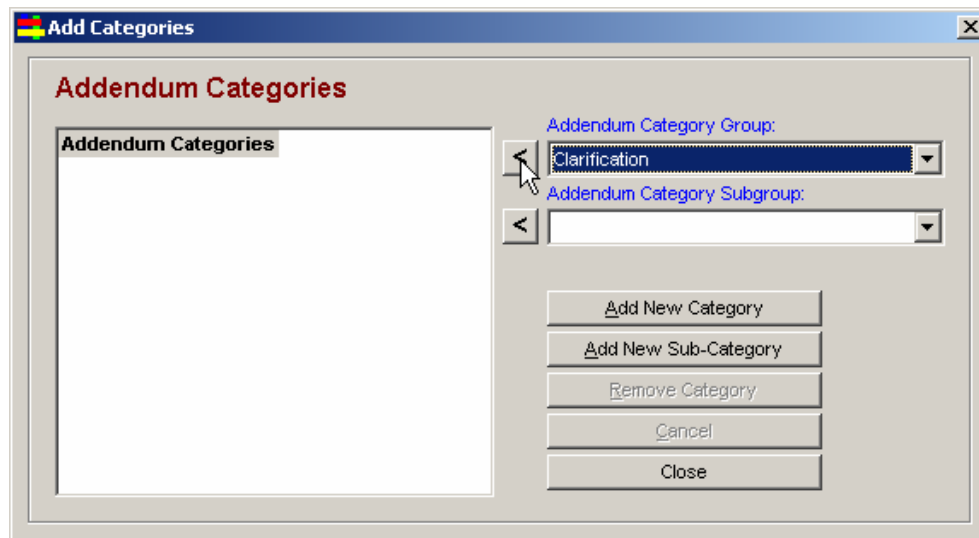
NOTE: If you would like to add another Category, repeat steps 2-4.

6. When completed adding the Category(s) to the Addenda Screen, click the
    ☐ Close ☐ button. The Category(s) will now display on the
    Addenda Screen.
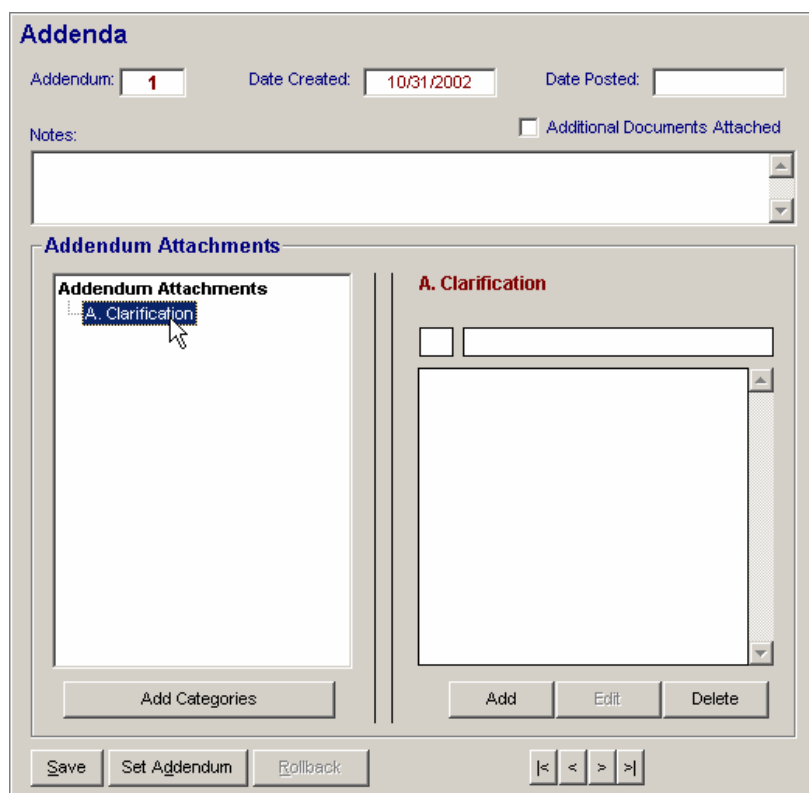
15.2.3 Add a Customized Category

1. Click on the [Add Categories] button. The Add Categories window appears.
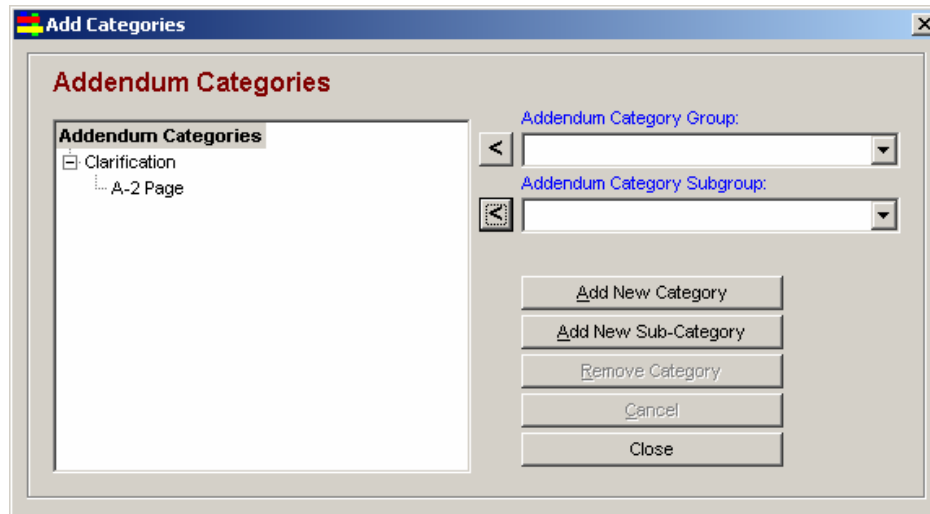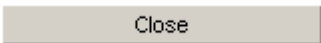
2. Click the [Add New Category] button. A New Category text field appears in the Addendum Categories menu.
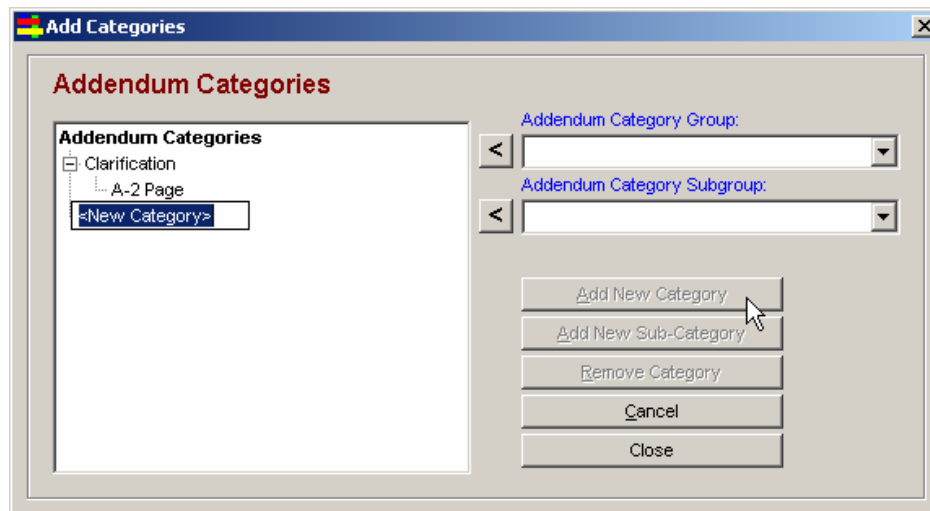
3. Types in the name of the new Category with the keyboard, when finished press the Enter key on your keyboard. The new Category has been added.
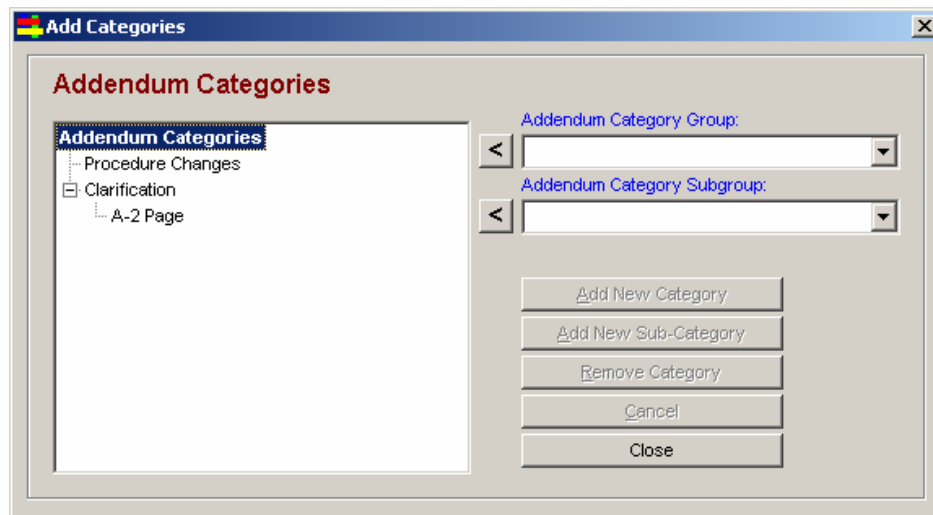
NOTE: If you want to add any more customized Categories, repeat steps 1-3.

4. Click the [Close] button.

15.2.4 Delete a Category

There are two ways to delete a Category.

15.2.4.1 The Addenda Screen

1. In the Addenda Screen, click on the Category you wish to delete.
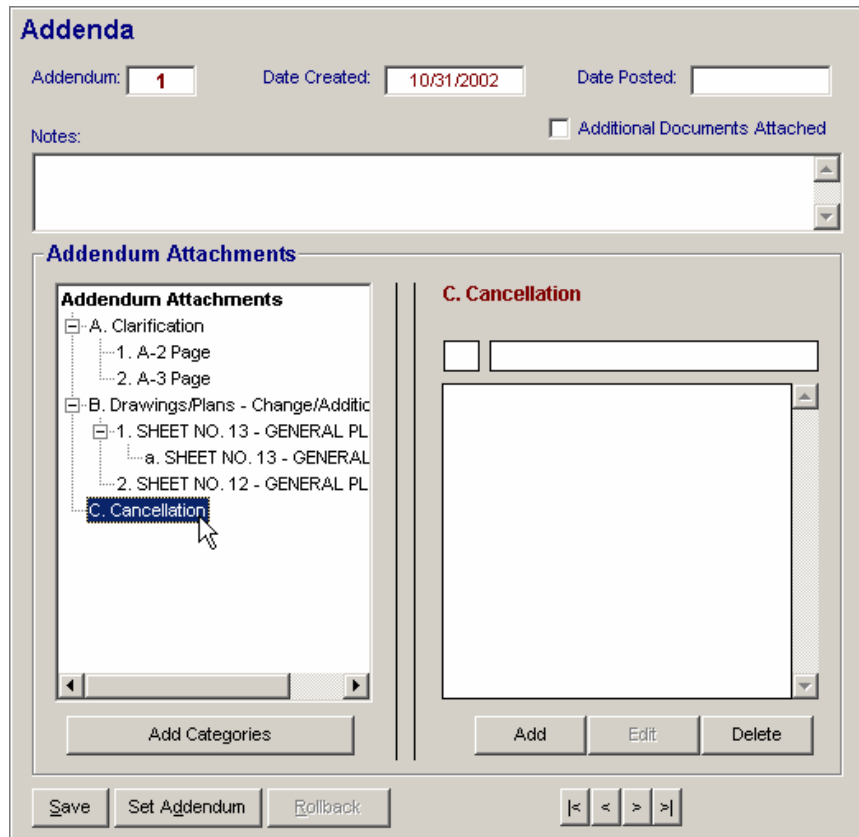
2. Click the Delete button. The following message appears.
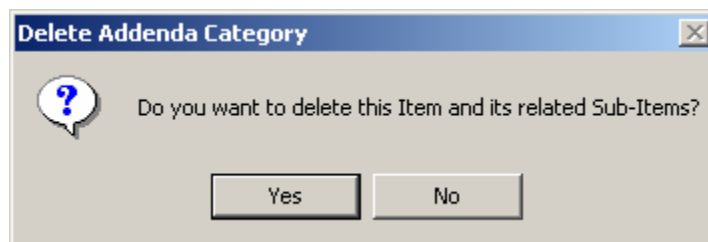
3. Click the Yes button.

15.2.4.2 The Add Categories Screen

1. On the Addenda Screen, click on the [Add Categories] button. The Add Categories window appears.
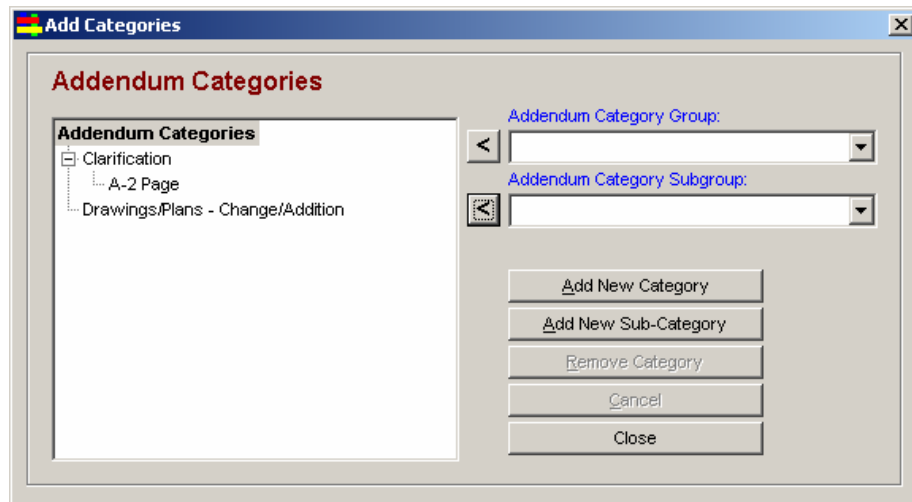
2. Click on the Category you wish to remove.
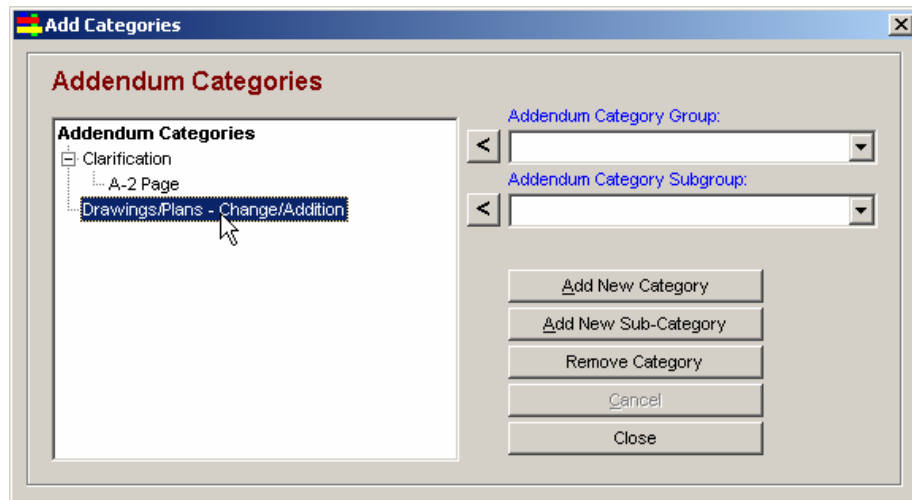
3. Click the [Remove Category] button. The Category has now been removed.
4. Click the [Close] button.

15.2.5 Add a Sub-Category to a Category

There are two ways to of adding a Sub-Category.

15.2.5.1 The Addenda Screen

1. Click on any category in the Addendum Attachments tree view. The area to the right will become active with category chosen appearing in red.

2. Click on the [Add] button. The Addendum Attachments window appears.

3. Enter in the corresponding information into the Title and Description text fields. Information must be entered in both fields to create the Sub-Category.

4. When finished click the **Apply** button.

5. Click the **Close** button. The information has now been entered into the Addenda screen.

NOTE: If you would like to and any more Sub-Categories repeat steps 1-5.

6. Click the **Save** button.

15.2.5.2 The Add Categories Screen

1. Click on the [Add Categories] button. The Add Categories screen will appear.
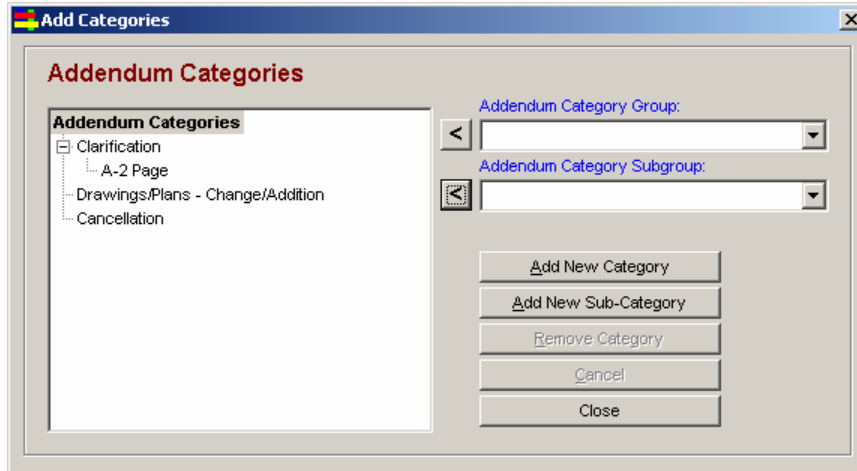
2. Click on any Category in the Addendum Categories tree view that you would like to add a Sub-Category to.
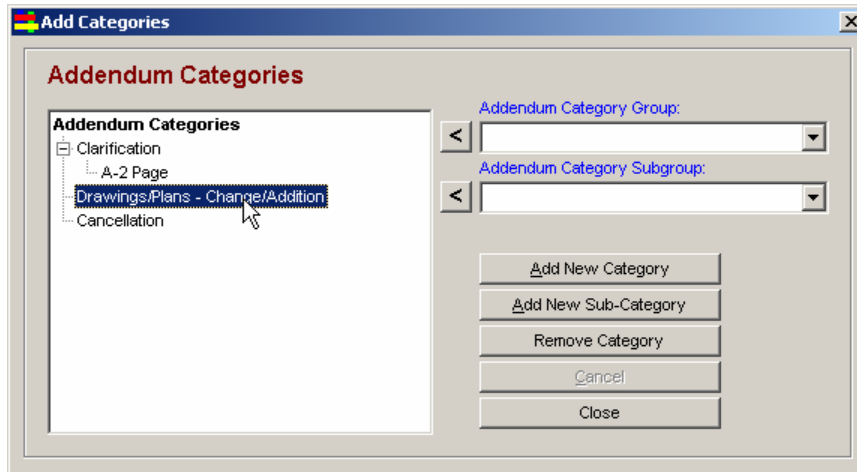
3. Click the [Add New Sub-Category] button. A New Sub-Category text field appears under the chosen Category.
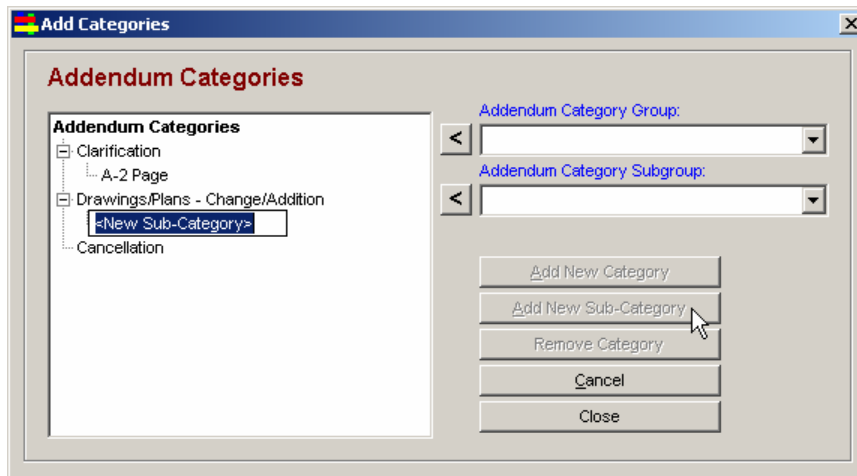
4. Use the keyboard to type in the Sub-Category's title.
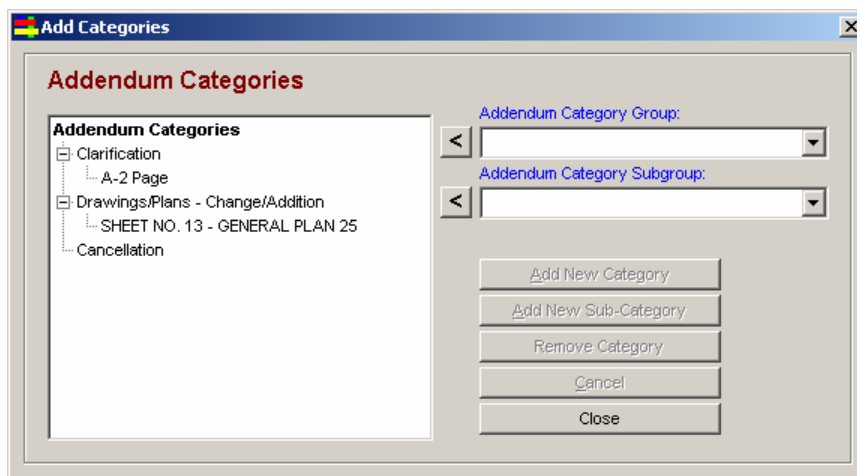
5. When finished press the Enter key on the keyboard.

   NOTE: If you would like to add any more Sub-Categories repeat steps 2-4.

6. Click the [Close] button.

NOTE: In using this method of adding Sub-Categories if the user wants to enter points to a Sub-Category, they will have to do so through the Addenda Screen.
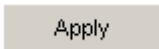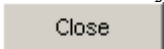
15.2.6 Editing a Sub-Category

1. In the Addenda Screen, click on the Sub-category you wish to edit. The selected Sub-Category's information will be displayed to the right of the Addendum Attachments tree view.

2. Click the [Edit] button. The Addendum Attachments window appears.

3. Make all the necessary changes and then click the [Apply] button.

4. Click the [Close] button.

5. Click the [Save] button.

15.2.7 Deleting a Sub-Category

1. In the Addenda Screen, click on the Category/Sub-category you wish to delete. The selected Sub-Category's information will be displayed to the right of the Addendum Attachments tree view.

2. Click the **Delete** button. The following message box appears.

3. Click the **Yes** button. The Category has now been removed.
4. Click the **Save** button.

15.2.8 Adding Points to a Sub-Category
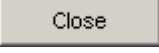
1. In the Addenda Screen, click on the Sub-Category in the Addendum Attachments tree view. The area to the right will become active.

2. Click on the [Add] button. The Addendum Attachments window appears.

3. Enter in the corresponding information into the Title and Description text fields. Information must be entered in both fields to create the Point.

4. When finished click the [Apply] button.

5. Click the [Close] button. The information has now been entered into the Addenda screen.

NOTE: If you would like to add any more Points repeat steps 1-5.

6. Click the [Save] button.
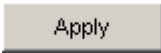
15.2.9 Edit Points to a Sub-Category

1. In the Addenda Screen, click on the Point you wish to edit. The Point will be displayed to the right of the Addendum Attachments tree view.

2. Click on the ⬚Edit button. The Addendum Attachments window appears.

3. Make all the necessary changes and then click the ⬚Apply button.
4. Click the ⬚Close button.
5. Click the ⬚Save button.

15.2.10 Delete a Point to a Sub-Category

1. Click on the Point you wish to delete. The selected Point will be displayed to the right of the Addendum Attachments tree view.
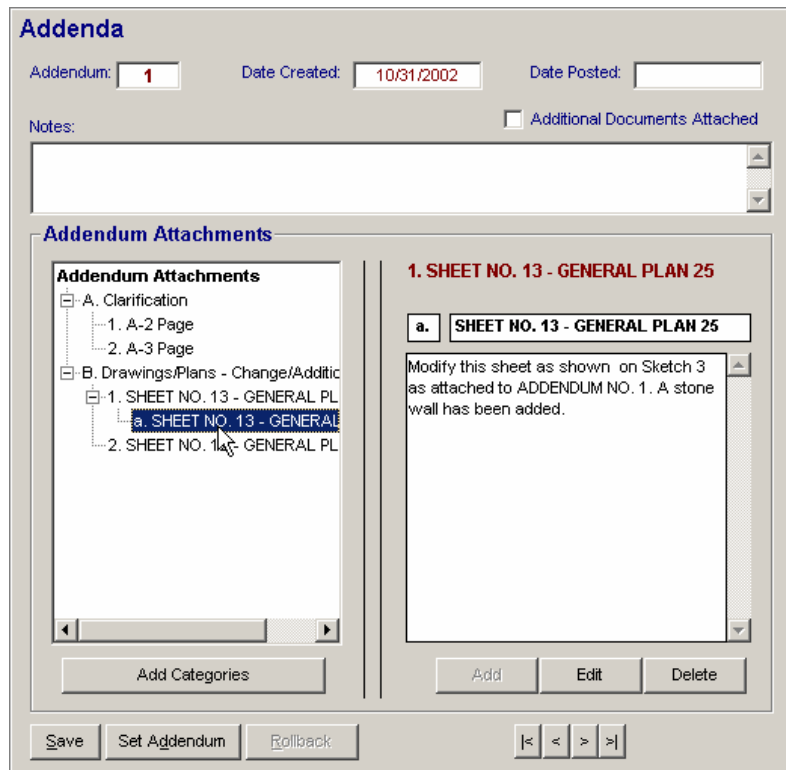
2. Click the [Delete] button. The following message box appears.
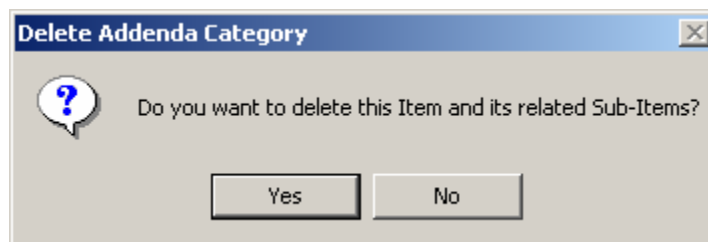
3. Click the [Yes] button. The Category has now been removed.
4. Click the [Save] button.

15.3 Addendum Update

> **NOTE: If changes are made to a project's items such as station quantities, Minimum acceptable bid price, etc. or contract dates the Addenda Screen will automatically update itself.**
>
> **Provided below are examples of the Addendum changes being tracked.**

15.3.1 Items

If an item is added, deleted or the item's quantity is altered the Addenda Screen will be updated automatically.

Example:

1. This is how the Addenda Screen appears before any item changes have been to the project

2. The user enters the Project Detail tab and selects the item 201.0301.

3. In the Stations Table the user increases one station's quantity from 3 to 8. This increases the total location quantity from 25 to 30.

4.   In the Addenda Screen, the Category, "Other Item Changes" has been added. A Sub-Category has also been added informing the user of the change in item quantity.

15.3.2 Contract Dates

If any Contract Date is edited the Addenda Screen will be updated automatically.

Example

    1.   This is how the Addenda Screen appears before any changes have been made to the project's Contract Dates

    2.   In the Contract Screen, the user changes the Bid Deadline from 10/11/02 to 10/14/02

3.   In the Addenda Screen, the Category, "Contract Dates" has been added. A Sub-Category, "Bid Deadline" has also been added informing the user of the change in date.

15.4 Additional Addenda Documents

1. If there are other documents pertaining to the Addendum that should be noted check off the Additional Documents Attached box located in the top-right side of the screen.

2. To do so place click in the white box to the left of Additional Documents Attached.

3. Click the **Save** button.

15.5 View all Addenda

1. Use the scroll keys in the bottom-right of the screen to navigate through each Addendum.

2. The Scroll Keys can be used in the following manner.

Go to first Addendum
Go to previous Addendum

Go to current Addendum
Go to next Addendum
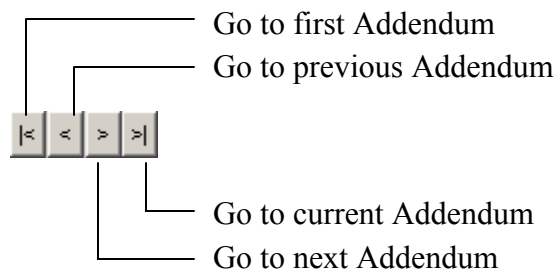
15.6 Post an Addendum

15.6.1 Standalone Application

1. Select the project you want to set the addendum to by clicking once on the Project Node in the My Projects Tab.

2. In the toolbar select Tools and then Post Addendum. A message will appear.
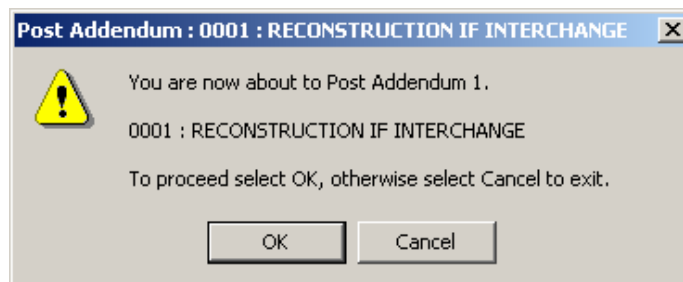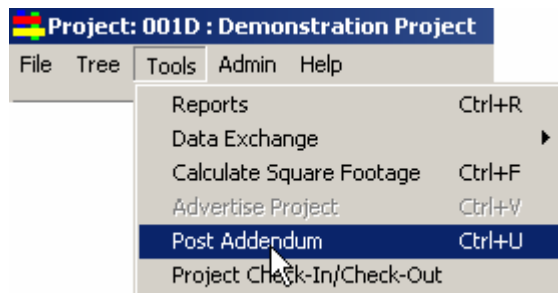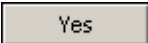
3. Click the [OK] button. The posting will initiate.
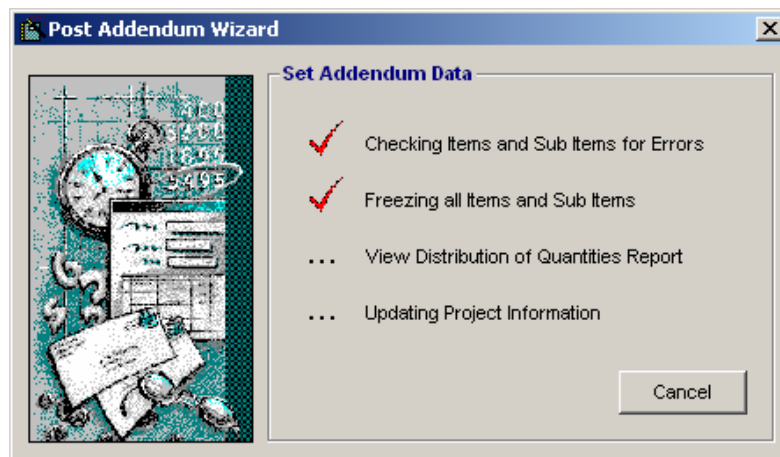
4. Before the posting is finished, a message will appear informing you that any future changes made to the project will result in the creation of a new Addendum.
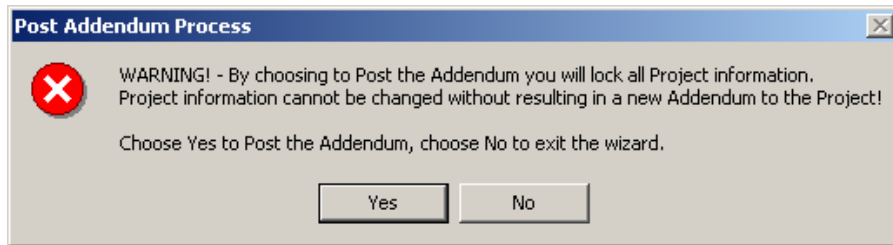
5. Click the [Yes] button. A message will appear informing you that the project has been successfully posted.

6. Click the [Exit] button.
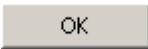
15.6.2 Network Application

1. Select the project you by clicking once on the Project Node in the My Projects Tab.

5. In the toolbar select Tools and then Post Addendum. A message will appear.
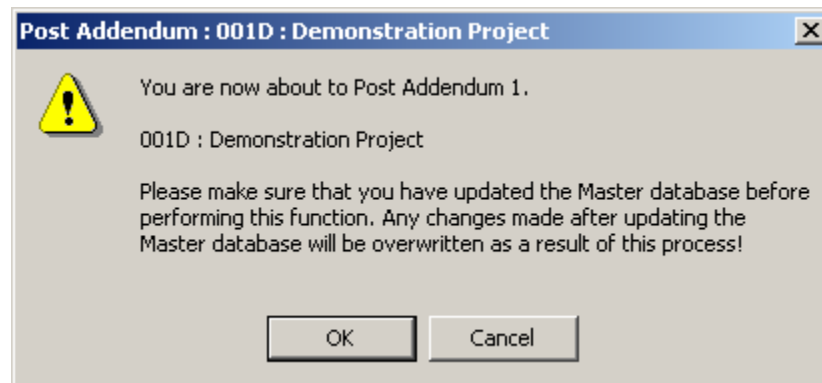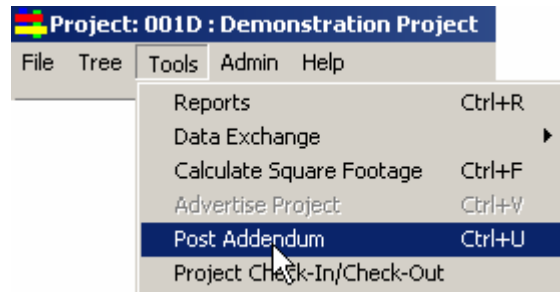
6. Click the [OK] button. The posting will initiate.
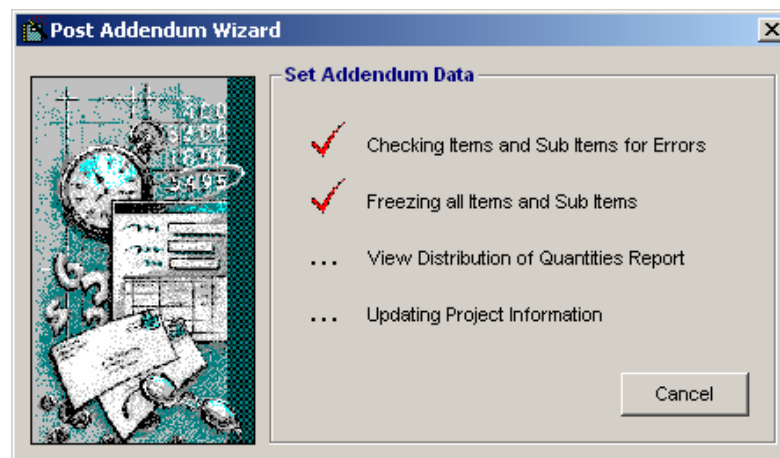
7. Before the posting is finished, a message will appear stating that any future changes made to the project will result in the creation of a new Addendum.
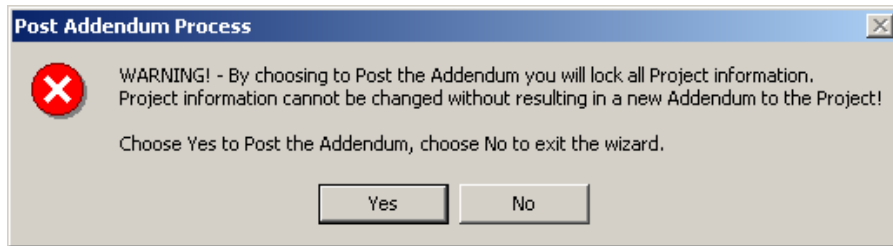
8. Click the [Yes] button. A message will appear informing you that the project has been successfully posted.
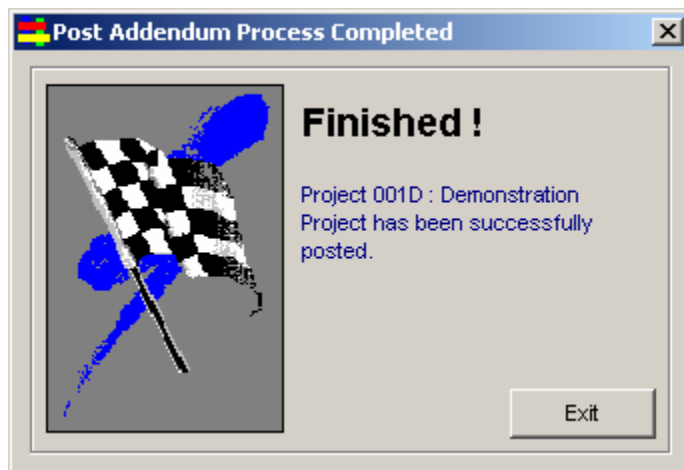
9. Click the [Exit] button.

16. Support Tab

1. To access the support menu, use the mouse to click-once on the support tab in the upper left section of the screen.
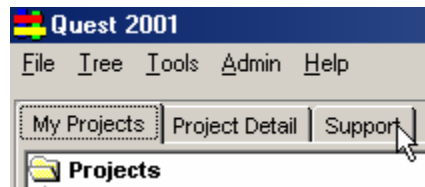
2. The support menu appears.
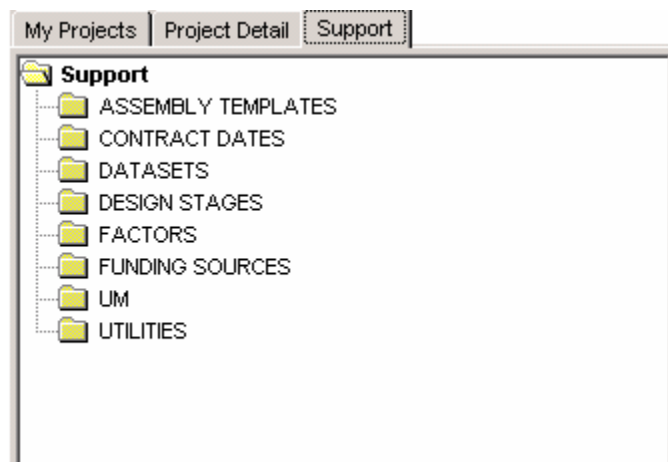
16.1 Assembly Templates

16.1.1 View Assembly Templates

To access the Assembly Template Setup, use the mouse and click-once on ASSEMBLY TEMPLATES in the Support menu. The Assembly Template Setup appears on the right side of the screen.

Assembly Name
Text Field

UM
Text Field

Save

Cancel

Delete
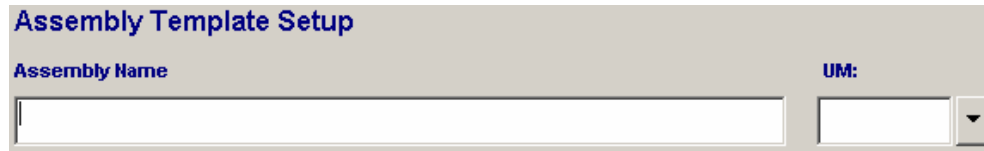
New
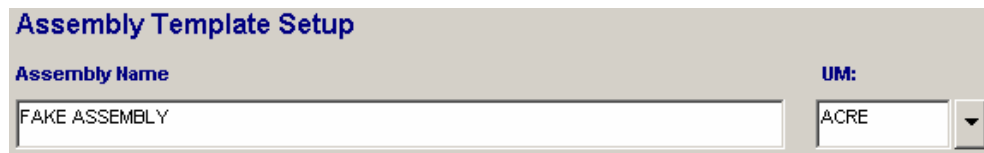
16.1.2 Add a New Assembly Template

1. Use the mouse to click-once on the [New] button. The Assembly Name text field becomes active.
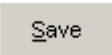
Assembly Template Setup

Assembly Name	UM:
	▼

2. Type in the new Assembly Name and Unit of Measure (UM).

Assembly Template Setup

Assembly Name	UM:
FAKE ASSEMBLY	ACRE ▼

3. Use the mouse to click-once on the [Save] button at the bottom of the screen.

4. A message appears stating that the Assembly has been created.

Assembly Templates

Assembly Template successfully created.

[OK]
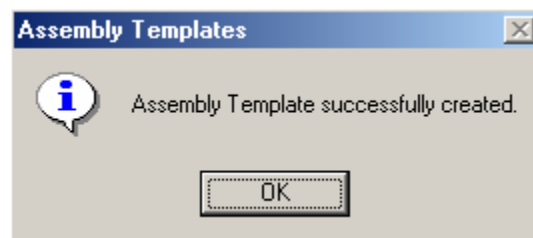
16.1.2 Delete a New Assembly Template
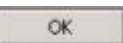
1. Using the arrow keys, navigate to the assembly template to be removed.
2. Once the Assembly Template to be removed is displayed on screen, click the Delete button located at the bottom of the screen. A message will appear to confirm the assembly template is to be deleted.
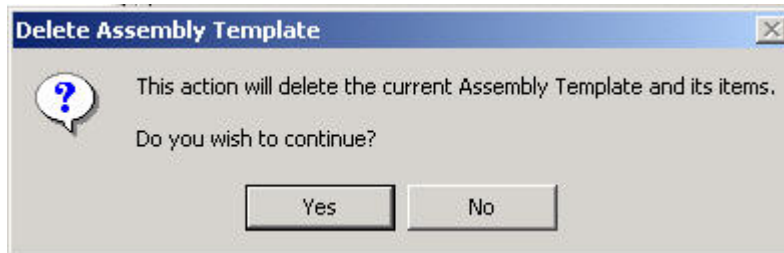
3. Click the Yes button to confirm the Assembly Template and its items should be removed. A message will appear to confirm the assembly template has been deleted.
   NOTE: This does not mean the items will be removed from the Items List in the Support Data or from any projects. The items are only being removed from the association with this assembly template.
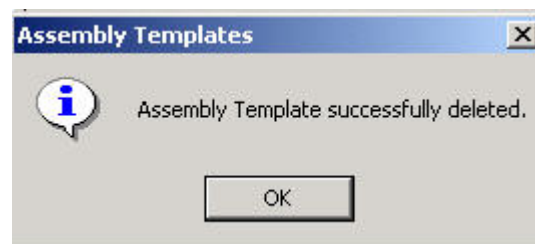
4. Click the OK button. The assembly template has been removed from the Support Data.

16.2 Contract Dates

16.2.1 View Contract Dates

1. To access the Contract Dates menu, use the mouse and click-once on
   CONTRACT DATES in the Support menu. The Contract Dates menu appears on
   the right side of the screen.

Find
Text Field

Date Type	Description	Contract Required
Bid Deadline		Yes
Bid Examine		Yes
Bid-Opening		Yes
Essential Completion		No
Final Completion		Yes
Landscape Completion		No
Phase 1 Completion		No
Phase 2 Completion		No
Phase 3 Completion		No
Pre-Bid		Yes
Proposal Read		Yes
Substantial Completion		No

Print

Delete

Edit

Add
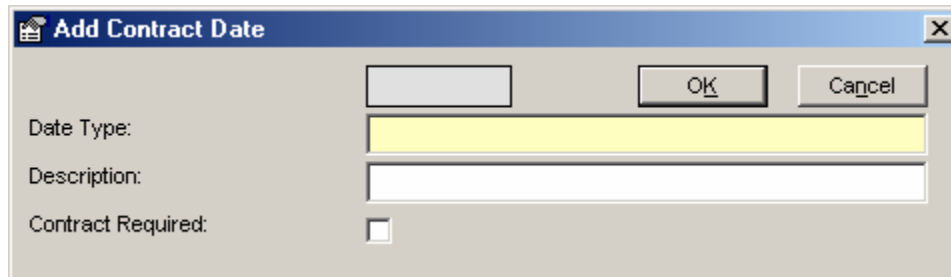
Add   Edit   Delete   Print
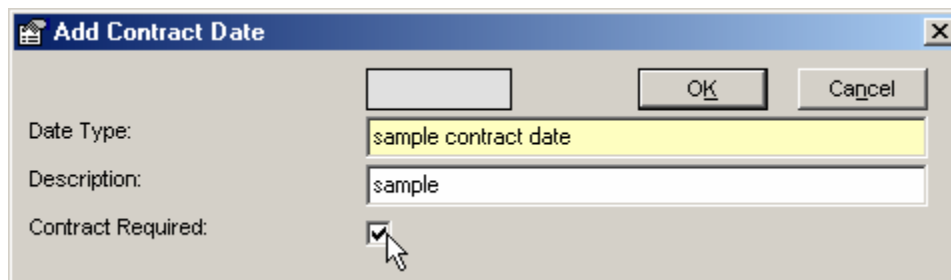
16.2.2 Add a new Contract Date

1. Use the mouse to click-once on the [New] button. The Add Contract Date template appears.

2. Use the mouse to click-once in the Date Type text field. If applicable enter a brief description in the Description text field.

3. If the contract is going to be required, use the mouse to click-once in the white square to the right of Contract Required.
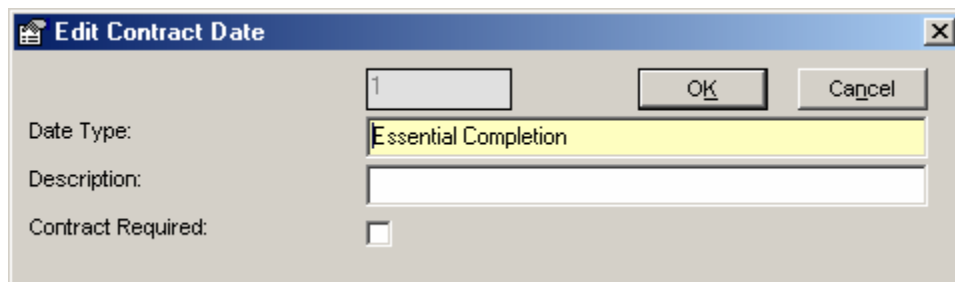
4. After all desired information has been entered use the mouse to click-once on the [OK] button.

16.2.3 Edit a Contract Date's Information

1. To edit a contract date's information, first, highlight the contract date by clicking once in the box to the left of the contract's Date Type.

	Date Type	Description	Contract Required
	Bid Deadline		Yes
	Bid Examine		Yes
	Bid-Opening		Yes
➜	Essential Completion		No
	Final Completion		Yes
	Landscape Completion		No
	Phase 1 Completion		No
	Phase 2 Completion		No
	Phase 3 Completion		No
	Pre-Bid		Yes
	Proposal Read		Yes
	Substantial Completion		No

2. Use the mouse to click-once on the [Edit] button.

3. The Edit Contract Date template appears.

Edit Contract Date

|1| [OK]   [Cancel]

Date Type: Essential Completion
Description:
Contract Required: ☐

4. Use the mouse to click-once in any text field, which contains the incorrect information and change accordingly.
5. After all information has been corrected click-once on the [OK] button.

16.2.4 Delete a Contract Date

1. To delete a contract date's information, first, highlight the contract date by clicking once in the box to the left of the contract's Date Type.

	Date Type	Description	Contract Required
	Bid Deadline		Yes
	Bid Examine		Yes
	Bid-Opening		Yes
→	Essential Completion		No
	Final Completion		Yes
	Landscape Completion		No
	Phase 1 Completion		No
	Phase 2 Completion		No
	Phase 3 Completion		No
	Pre-Bid		Yes
	Proposal Read		Yes
	Substantial Completion		No

2. Use the mouse to click-once on the [Delete] button.

16.2.5 Print a list of all Contract Dates

1. Use the mouse to click-once on the [Print] button.

16.3 Datasets

16.3.1 View Datasets

1. To access the dataset menu, use the mouse and click-once on DATASET in the Support menu. The Dataset menu appears on the right side of the screen.

Import

Delete

Select Default
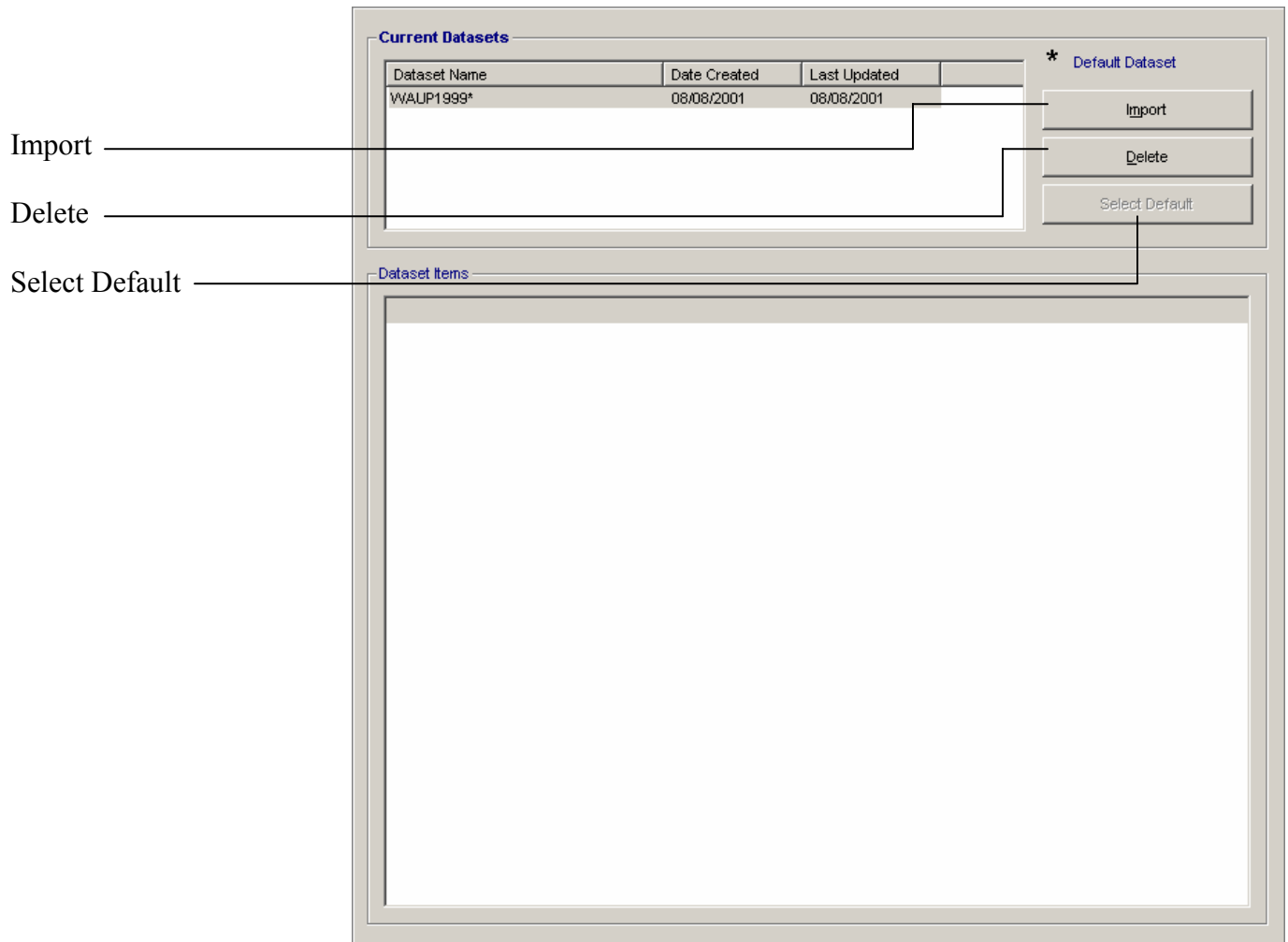
16.3.2 Import a New Dataset

1. Click on the [Import] button located in the upper-right hand part of the screen. The Import Dataset browser appears.
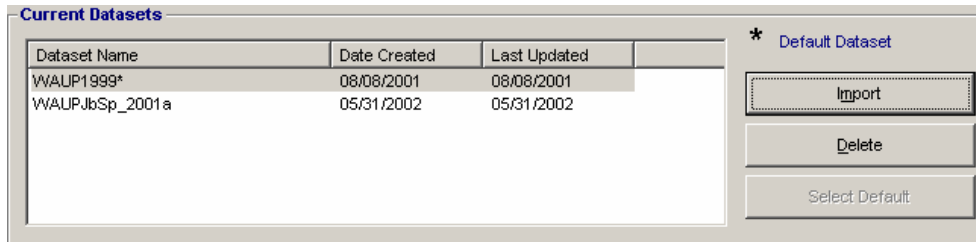
Drive Browser →

Import Dataset

Select a Dataset .xml file.

a:

a:\

- WAUPJbSp_1998.xml
- WAUPJbSp_1999.xml
- WAUPJbSp_2000.xml
- WAUPJbSp_2001.xml
- WAUPJbSp_2001a.xml
- WAUPJbSp_2002.xml
- WAUPStd_1998.xml
- WAUPStd_1999.xml

File name :

File path:

[Select] [Cancel]
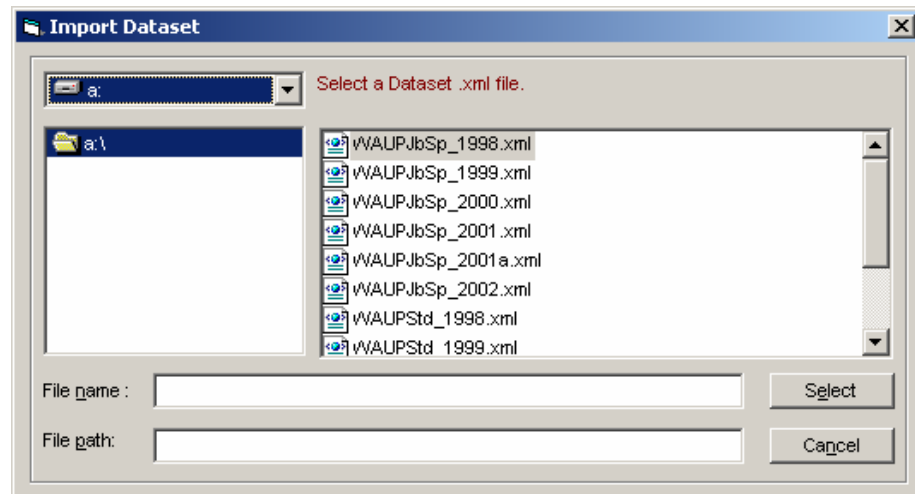
2. Using the Drive Browser, select the drive that contains the correct dataset (.xml file).

3. Click on the .xml file to highlight it and then click [Select]. The View and Save Dataset window appears.

View and Save Dataset

Dataset Name: WAUPJbSp_2001a   [Save]

Total Items: **221**   [Cancel]

Dataset Items

Dataset Items Window →

Item Code	Description	UM	WAI
201.9901	CLEARING AND GRUBBING	SY	$1.
201.9901	DEMOLITION, WINGWALL	CY	$376.
201.9901	REMOVE AND DISPOSE CONCRETE ...	LS	$587.
201.9901	REMOVE AND SALVAGE TRAFFIC SI...	LS	$8,833.
201.9902	PRE AND POST-CONSTRUCTION CO...	LS	$22,050.
201.9902	REMOVE AND DISPOSAL OF SHRUBS	EACH	$19.
201.9902	REMOVE AND DISPOSE PRECAST M...	LF	$2.
201.9903	REMOVE AND DISPOSE GREENWOO...	LS	$637.
201.9903	REMOVE AND DISPOSE HEADWALL	LF	$13.
201.9903	REMOVE AND STOCKPILE SLOPE PA...	SY	$14.
201.9904	REMOVE AND DISPOSE BITUMINOUS...	SY	$15.
201.9904	REMOVE AND DISPOSE OF TIMBER ...	LF	$75.
201.9904	REMOVE AND DISPOSE STAMPED C...	SY	$10.
201.9904	REMOVE AND DISPOSE WOOD TIMB...	LF	$11.

288

4. Use the Dataset Items window to verify this is the dataset you want to import. Click the [Save] button.

5. The Dataset will now appear Current Dataset window.
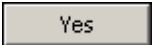
16.3.3 Delete Dataset

1. To delete a dataset, first, click-once on the undesired dataset to highlight it.
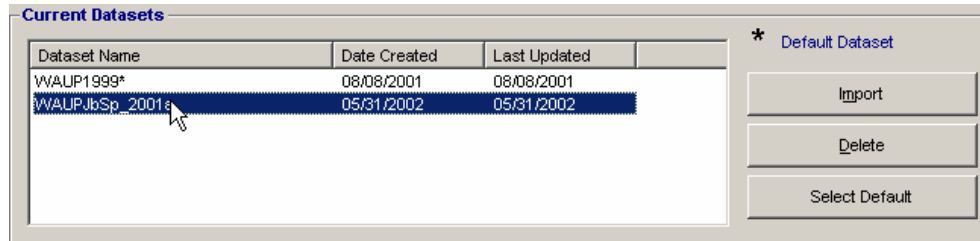
2. Click the [Delete] button. A message appears to confirm the deletion of the dataset.
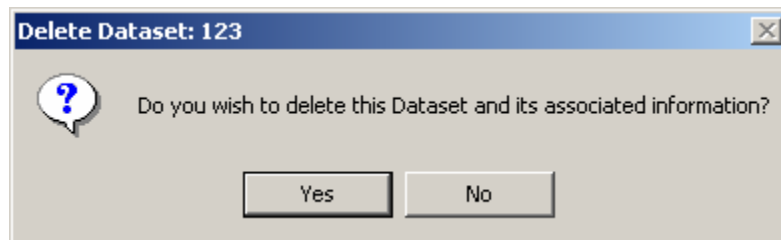
3. Click on the [Yes] button.
4. The dataset will no longer appear in the Current Dataset window.

16.4 Design Stages

16.4.1 View Design Stages

1. To access the Design Stage menu, use the mouse and click-once on DESIGN
    STAGES in the Support menu. The Design Stages menu appears on the right side
    of the screen.

Find Text Field

DESIGN STAGE CODE	DESCRIPTION
10	10% Design
30	30% Design
75	75% Design
90	90% Design
ADV	Advertising
FDES	Final Design
PS&E	PS&E
S&D	Study and Development

Print

Delete

Edit

Add

Add   Edit   Delete   Print
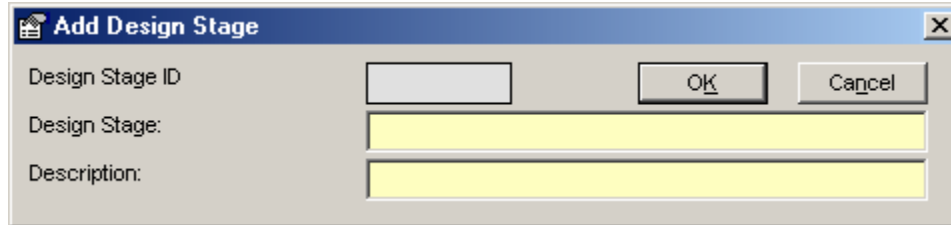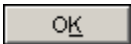
16.4.2 Add a new Design Stage

1. Use the mouse to click-once on the [New] button. The Add Design Stage
    template appears.
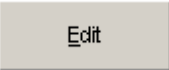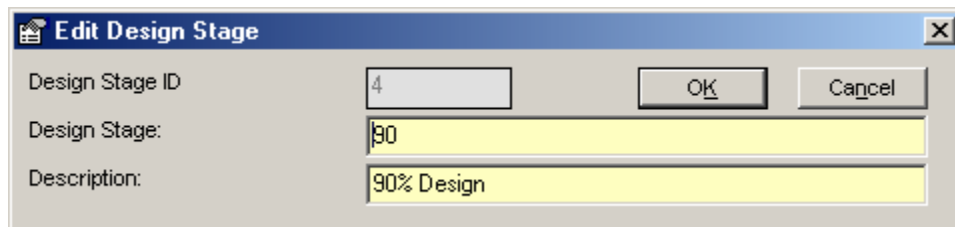
2. Use the mouse to click-once in the Design Stage text field. Type in the name of
    the stage. Also enter a brief description in the Description text field.

3. After all desired information has been entered use the mouse to click-once on the
    [OK] button.

16.4.3 Edit a Design Stage's Information

1. To edit a design stage's information, first, highlight the design stage by clicking once in the box to the left of the stage's DESIGN STAGE CODE.
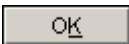
DESIGN STAGE CODE	DESCRIPTION
10	10% Design
30	30% Design
75	75% Design
90	90% Design
ADV	Advertising
FDES	Final Design
PS&E	PS&E
S&D	Study and Development

2. Use the mouse to click-once on the [Edit] button.

3. The Edit Design Stage template appears.

Edit Design Stage		
Design Stage ID	4	OK Cancel
Design Stage:	90	
Description:	90% Design	

4. Use the mouse to click-once in any text field, which contains the incorrect information and change accordingly.

5. After all information has been corrected click-once on the [OK] button.

293

16.4.4 Delete a Design Stage

1. To delete a design stage's information, first, highlight the design stage by clicking once in the box to the left of the stage's DESIGN STAGE CODE.

DESIGN STAGE CODE	DESCRIPTION
10	10% Design
30	30% Design
75	75% Design
90	90% Design
ADV	Advertising
FDES	Final Design
PS&E	PS&E
S&D	Study and Development

2. Use the mouse to click-once on the [Delete] button.

16.4.5 Print a list of all Design Stages

1. Use the mouse to click-once on the [Print] button.

16.5 Factors
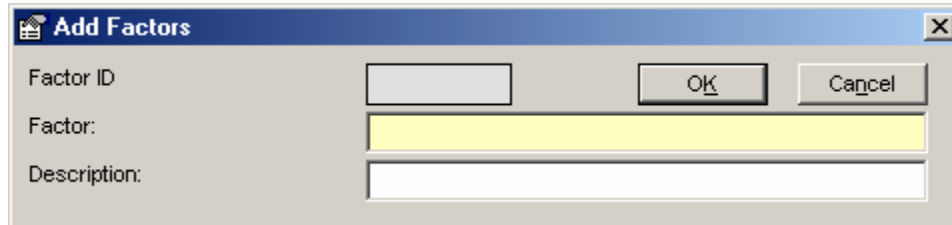
### 16.5.1 View Factors

1. To access the factors menu, use the mouse and click-once on FACTORS in the Support menu. The Factors menu appears on the right side of the screen.

Find
Text Field

Print

Delete

Edit

Add
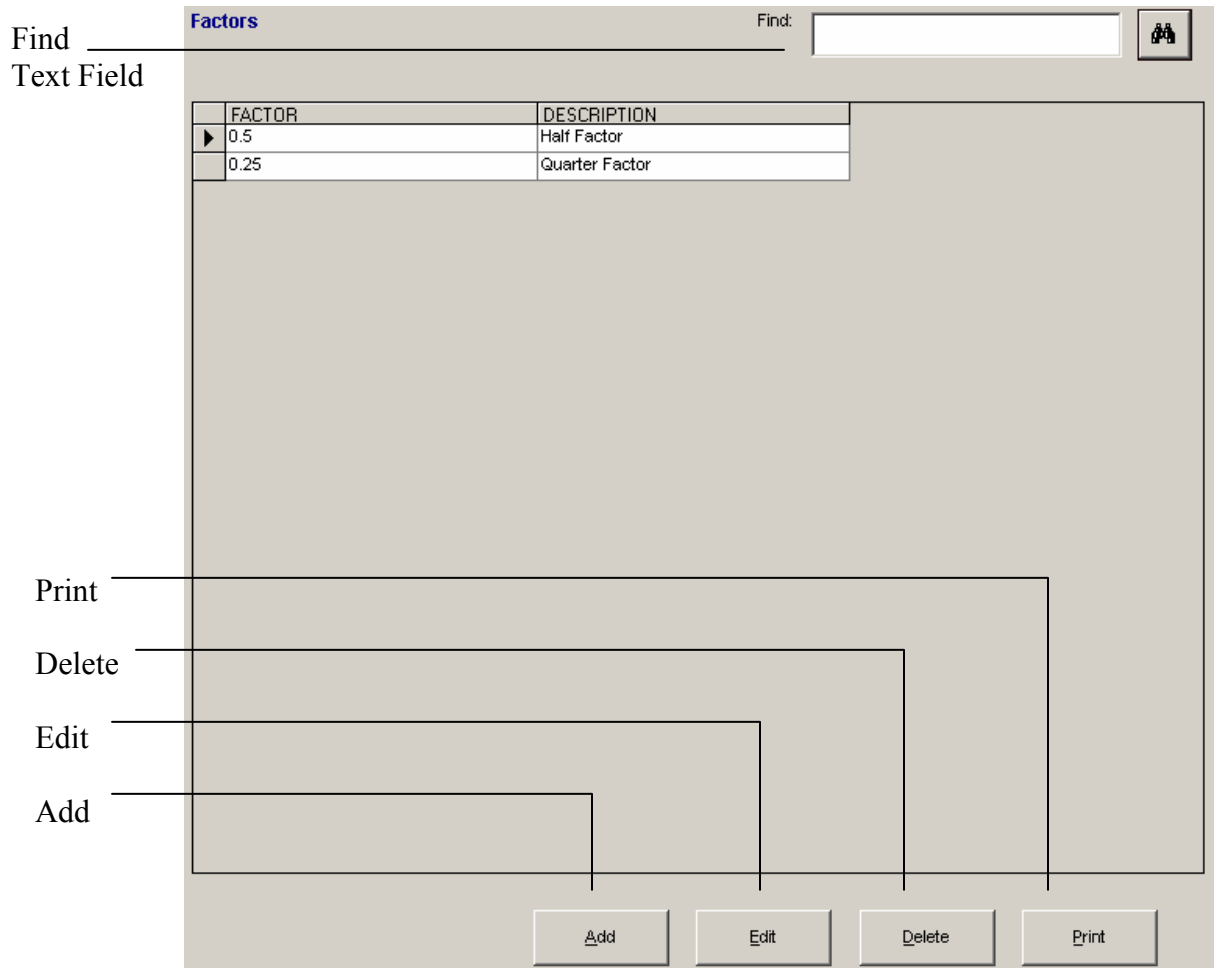
16.5.2 Add a new Factor

1. Use the mouse to click-once on the [New] button. The Add Factors template appears.

Add Factors				x
Factor ID	[　　　]		OK	Cancel
Factor:	[　　　　　　　　　]			
Description:	[　　　　　　　　　]			

2. Use the mouse to click-once in the Factor text field and enter in the correct factor. If desired enter a brief description in the Description text field.

3. After all desired information has been entered use the mouse to click-once on the [OK] button.

16.5.3 Edit a Factor's Information

1. To edit a factor's information, first, highlight the factor by clicking once in the box to the left of the FACTOR column.

	FACTOR	DESCRIPTION
▶	0.5	Half Factor
	0.25	Quarter Factor

2. Use the mouse to click-once on the [Edit] button.
3. The Edit Factors template appears.

4. Use the mouse to click-once in any text field, which contains the incorrect information and change accordingly.
5. After all information has been corrected click-once on the [OK] button.

16.5.4 Delete a factor

1. To delete a factor's information, first, highlight the factor by clicking once in the box to the left of the FACTOR column

FACTOR	DESCRIPTION
0.5	Half Factor
0.25	Quarter Factor

2. Use the mouse to click-once on the ⬚ Delete ⬚ button.

16.5.5 Print a list of all Factors

1. Use the mouse to click-once on the Print button.

16.6 Funding Sources

16.6.1 View Funding Sources

1. To access the funding sources menu, use the mouse and click-once on FACTORS in the Support menu. The Factors menu appears on the right side of the screen.

Find
Text Field

Print

Delete

Edit

Add
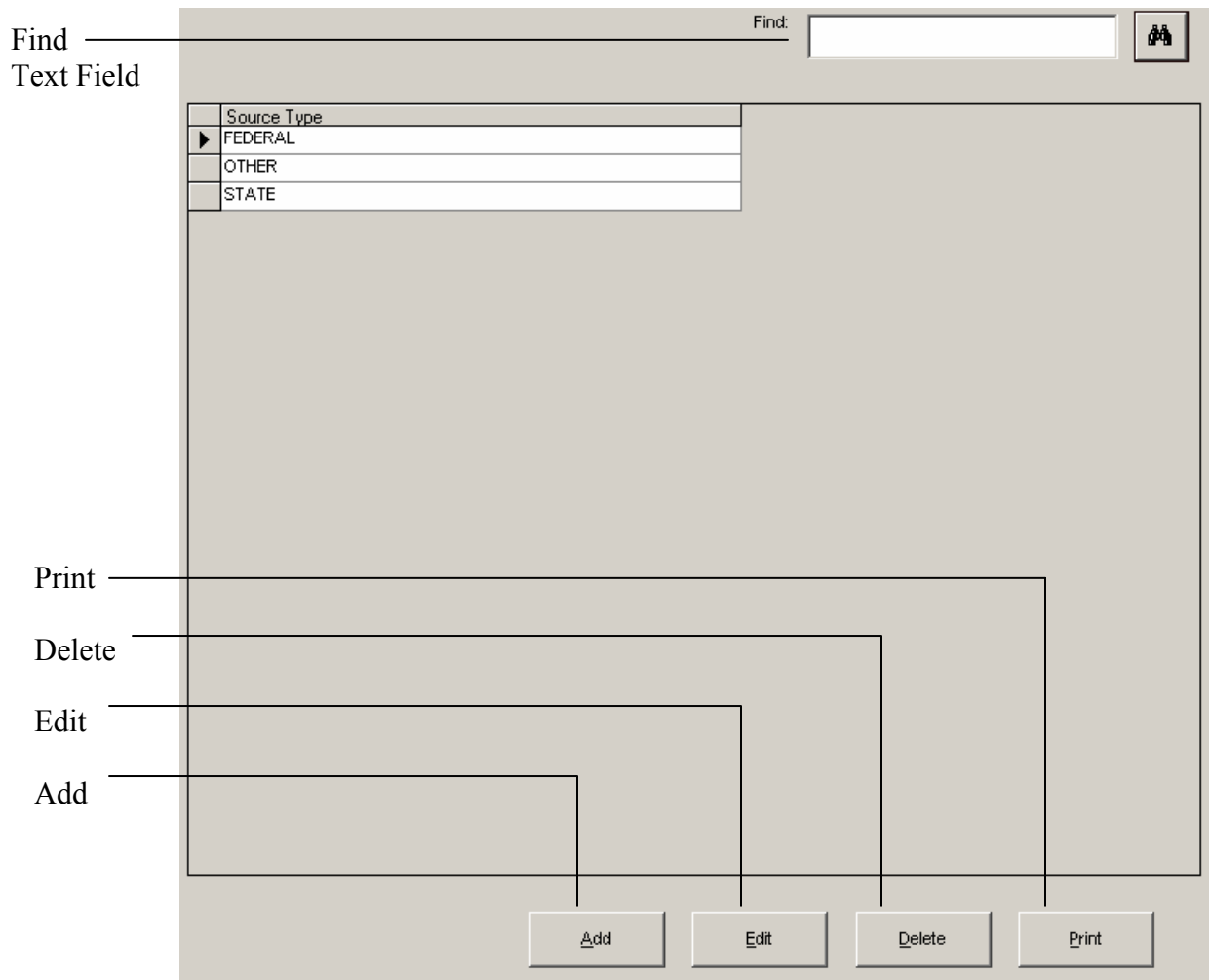
16.6.2 To Add a New Funding Source

1. Use the mouse to click-once on the [New] button. The Add Funding Type template appears.
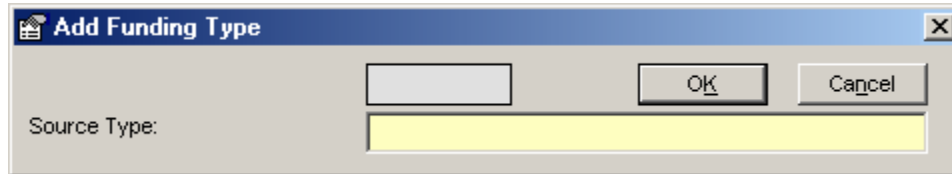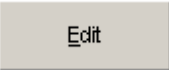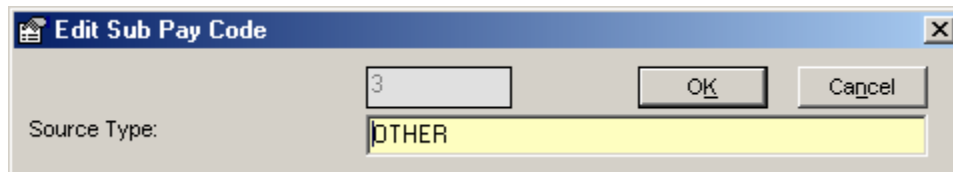
2. Use the mouse to click-once in the Source Type text field. Type in the funding source.

3. Click-once on the [OK] button.

16.6.3 Edit a Funding Source

1. To edit a funding source, first, highlight the funding source by clicking once in the box to the left of the Source Type column.

	Source Type
	FEDERAL
▶	OTHER
	STATE

2. Use the mouse to click-once on the **Edit** button.

3. The Edit Sub Pay Code template appears.

4. Use the mouse to click-once in Source Type text field. Change the incorrect information
5. Click-once on the **OK** button.

16.6.4 Delete a Funding Source

1. To delete a funding source, first, highlight the funding source by clicking once in the box to the left of the Source Type column

Source Type
FEDERAL
▶ OTHER
STATE

2. Use the mouse to click-once on the [Delete] button.

16.6.5 Print a list of all Funding Sources

1. Use the mouse to click-once on the [Print] button.

16.7 Unit of Measure

16.7.1 View Unit of Measure

1. To access the UM menu, use the mouse and click-once on UM in the Support menu. The UM menu appears on the right side of the screen.

Find
Text Field

Print

Delete

Edit

Add
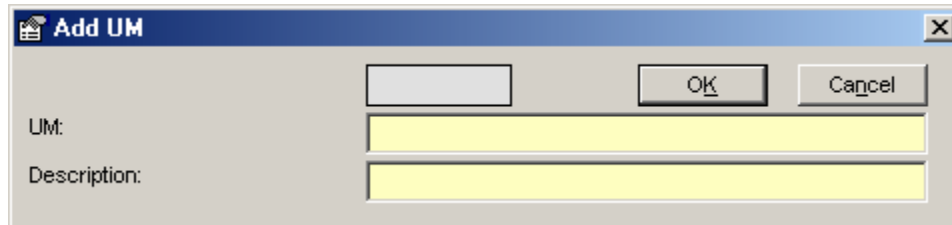
16.7.2 To Add a New UM

1. Use the mouse to click-once on the [New] button. The Add UM template appears.
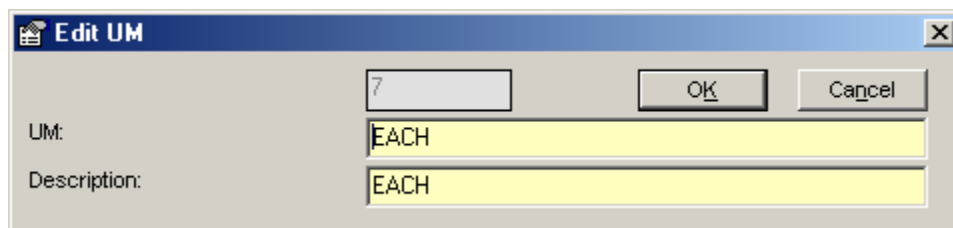

2. Use the mouse to click-once in the UM text field. Type in the UM and then click-once in the Description text field and enter a brief description.

3. Click-once on the [OK] button.

16.7.3 Edit a UM

1. To edit a UM, first, highlight the UM by clicking once in the box to the left of the UM column.

UM	DESCRIPTION
ACRE	ACRE
BM	BM
CF	CF
CI	CI
CY	CY
EACH	EACH
GRP	GRP
HLF	Hundred Linear Feet
HRS	machine hours
LBS	LBS
LF	LF
LS	LS
MBM	MBM
MGAL	MGAL
MHRS	MHRS
PBAG	PBAG
PDAY	PDAY
PMO	PMO
SF	Square Foot
SY	Square Yards
TON	TON
VLF	VLF

2. Use the mouse to click-once on the [Edit] button.

3. The Edit UM template appears.

Edit UM

	7 OK Cancel
UM:	EACH
Description:	EACH

4. Use the mouse to click-once in UM text field change the incorrect information. Do the same for the Description text field.
5. Click-once on the [OK] button.

16.7.4 Delete a UM

1. To delete a UM, first, highlight the UM by clicking once in the box to the left of the UM column

UM	DESCRIPTION
ACRE	ACRE
BM	BM
CF	CF
CI	CI
CY	CY
EACH	EACH
GRP	GRP
HLF	Hundred Linear Feet
HRS	machine hours
LBS	LBS
LF	LF
LS	LS
MBM	MBM
MGAL	MGAL
MHRS	MHRS
PBAG	PBAG
PDAY	PDAY
PMO	PMO
SF	Square Foot
SY	Square Yards
TON	TON
VLF	VLF

2. Use the mouse to click-once on the Delete button.

16.7.5 Print a list of all Funding Sources

1. Use the mouse to click-once on the ⬚Print⬚ button.

16.8 Utilities

   16.8.1 View Utilities

1. To access the utility menu, use the mouse and click-once on UTILITIES in the Support menu. The Utility menu appears on the right side of the screen.

Find
Text Field

UTILITY	DESCRIPTION
EI	Electrical Items
GI	Gas Items
SI	Sewer Items
TI	Telephone Items
WI	Water Items

Find:

Print

Delete

Edit

Add
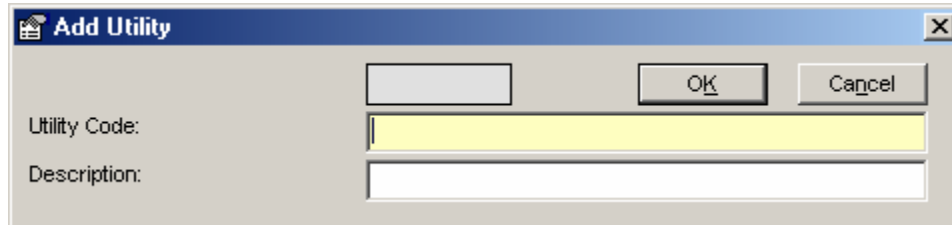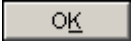
Add   Edit   Delete   Print

16.8.2 Add a New Utility

1. Use the mouse to click-once on the [New] button. The Add Utility template appears.
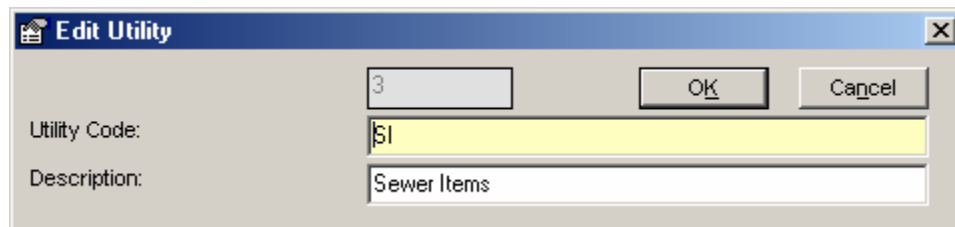

2. Use the mouse to click-once in the Utility Code text field and type in the code. Do the same for the Description text field.

3. Click-once on the [OK] button.

16.8.3 Edit a Utility

1. To edit a utility, first, highlight the utility by clicking once in the box to the left of the UTILITY column.

	UTILITY	DESCRIPTION
	EI	Electrical Items
	GI	Gas Items
▶	SI	Sewer Items
	TI	Telephone Items
	WI	Water Items

2. Use the mouse to click-once on the **Edit** button.

3. The Edit Utility template appears.

4. Use the mouse to click-once in any text field that has to be changed. Type in correct information where applicable.
5. Click-once on the **OK** button.

16.8.4 Delete a Utility

1. To delete a utility, first, highlight the utility by clicking once in the box to the left of the UTILITY column.

	UTILITY	DESCRIPTION
	EI	Electrical Items
	GI	Gas Items
▶	SI	Sewer Items
	TI	Telephone Items
	WI	Water Items

2. Use the mouse to click-once on the [Delete] button.

16.8.5 Print a list of all Utilities

1. Use the mouse to click-once on the [Print] button.